

# Media Trends in the Nordic Countries

Newsletter from NORDICOM

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# The Media Market

## Top 25 Media Companies on the Nordic Market in 2015

Media Companies | Nordic December 2016 | StS

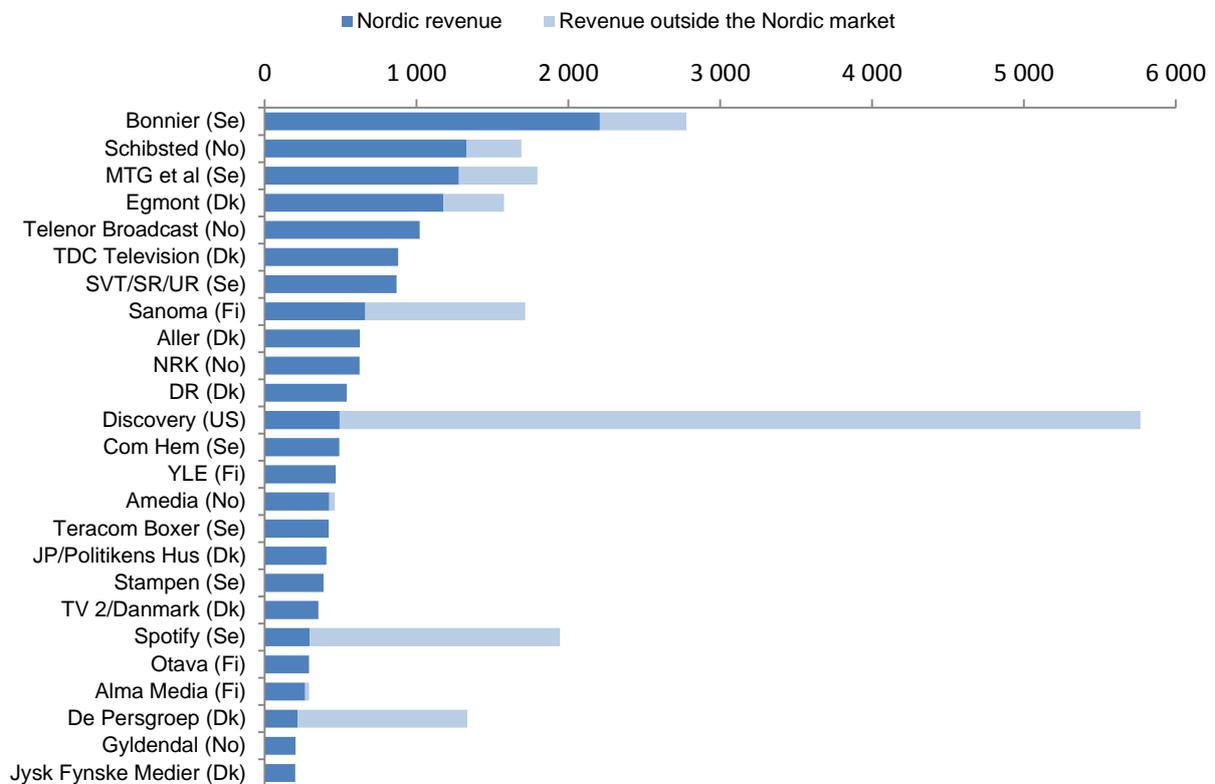
**In 2015, five media companies, all Nordic, reached a turnover of one billion euros on the Nordic markets. The largest by far is the Swedish Bonnier group, followed by Norway's Schibsted Media Group and the Swedish Stenbeck sphere (MTG/Viasat).**

In terms of total corporate revenue, Bonnier also takes the lead. But on such a list, it is the Swedish-owned music service Spotify that ranks second, after having almost doubled its turnover in a year.

For many of the media companies on Nordicom's top 25 list, revenue decreased in 2015 or stayed at approximately the same level as in 2014. Particularly the companies with a large part of their operations in the newspaper business have seen declining revenues. One company with a sharp increase in media revenue was the Danish telecommunications company TDC, after its acquisition of the Norwegian TV distributor Get.

The most profitable companies on the list are the two Swedish TV distributors Com Hem, with a gross margin of +29%, and Teracom, with a gross margin of +14%.

### The 25 largest media companies by revenue on the Nordic market in 2015 (EUR million)



*Note:* The companies are ranked by their revenue in the Nordic countries, in dark blue. Revenue outside the Nordic market is added in light blue. *Source:* Nordicom (based on the companies' annual reports and web pages)

**Download:** [Graph \(PDF\)](#) | [Full table incl. Nordic revenues, company revenues, results, profit margins \(Excel\)](#)

### *Spotify – large, global, but unprofitable*

The four largest companies in the Nordic markets – Bonnier, MTG with its sister companies in the Stenbeck sphere, Schibsted Media Group, and Egmont – all have operations outside the Nordic countries; but the largest share, at 70% or more of their income, is generated within the Nordic countries. Finland's largest media company, Sanoma, which is the same size as Schibsted, instead earns more than 60% of its revenues outside the Nordic region, and the rest almost entirely from the domestic market.

The Swedish music service Spotify is typical of the new fully digital businesses, with the world as its market; only 15% of its revenue is generated in the Nordic countries. As for Spotify, the company showed the single worst result among the companies on the Nordic list, with a gross margin of -9% compared with -15% the previous year.

### *Programme companies, TV distribution and print*

The Nordic TV companies are all included on the list, either as subsidiaries of large groups (Bonnier's TV4 in Sweden and MTV in Finland, Sanoma's Nelonen in Finland, the Stenbeck sphere's channels in the Nordic countries, and Egmont's TV2 in Norway) or as their own units, such as Discovery Networks Nordic with TV channels in all the Nordic countries except Iceland, and TV2 Denmark (partly public service TV), owned by the Danish state. The Nordic public service companies are also on the list, with the exception of RÚV in Iceland.

Four distribution companies are among the top 25, and include cable, satellite, broadband and terrestrial operators. Norwegian Telenor, which distributes TV in the Nordic countries (Canal Digital), and Danish TDC are both parts of major telecom corporations, but are ranked here based on their TV-related activities. Com Hem is active in Sweden, while Teracom (owned by the Swedish state) owns and operates the terrestrial networks in Sweden and Denmark (Teracom's pay-TV company Boxer was acquired in 2016 by Com Hem). In addition, MTG is also a significant player on the Nordic TV distribution market.

Another group is a number of companies with their core businesses in the print media. The largest is Aller from Denmark, followed by Amedia, JP/Politikens Hus, Stampen, Otava, Alma Media, the Persgroep with Berlingske Media, Gyldendal (Norway), and Jysk Fynske Media.

### *Nordic ownership, with some exceptions*

The Nordic media market is also Nordic concerning ownership structure: only four of the 25 largest companies have owners outside the region. The two distribution companies Com Hem and TDC television (which includes Denmark's largest distributor, YouSee) are owned by foreign private equity firms. The third is the media group comprising the Nordic subsidiaries of US-based Discovery Communications. The last is the Danish newspaper group Berlingske Media, which was sold by the UK Mecom group to the Belgian media company de Persgroep at the beginning of 2015.

**Download tables** from Nordicom's [table database](#) (Excel):

[The 25 largest media companies on the Nordic market in 2015: Nordic revenue](#) (EUR million)

[The 20 largest Nordic media companies in 2015: Company revenue](#) (graph, PDF)

[The 20 largest Nordic media companies in 2015: Company revenue](#) (EUR million)

[The 20 largest Nordic media companies in 2015: Company revenue 2005-2015](#) (EUR million)

## Global challenges for the Nordic media industry

Media Market | Nordic November 2016 | UF, EH

**Competition from global players in the advertising market is growing. But what consequences do the operations by, for instance, Google and Facebook have for media and journalism in the Nordic countries? This will be examined by Nordicom in a new study.**

This autumn, Nordicom has launched a review of the international digital players' impact on the advertising markets – and the media – in the Nordic countries. The project *Global challenges for the Nordic media industry* was initiated and funded by the Nordic Council of Ministers and will be reported during spring 2017.

### *Growing competition for advertising money*

The background for the project is the new competition in the advertising market. Advertisers can now reach their target audiences with greater precision, and at lower cost, by using, for example, Google and Facebook rather than through traditional media. For the media, this means shrinking advertising revenues and major challenges for their business models. How will the production of journalism and other domestic content be financed when the ad money ends up with global players?

### *All five Nordic countries will be included*

The analysis will be based on studies of the structure of the advertising markets and media policy frameworks in the Nordic countries, as well as on interviews with key players in the various media markets. The project will be reported at a ministerial meeting in April 2017, and later on, a report will be presented during the [Nordic Media Festival](#) in Bergen, 10 to 12 May 2017. Responsible researcher at Nordicom is Jonas Ohlsson, and assistant researcher is Ulrika Facht.

**More studies underway:** In Denmark, there is an ongoing survey of the international actors' importance in the Danish media market. The project was initiated by the Danish Agency for Culture and Palaces, and will be completed in summer 2017. [Read more.](#)

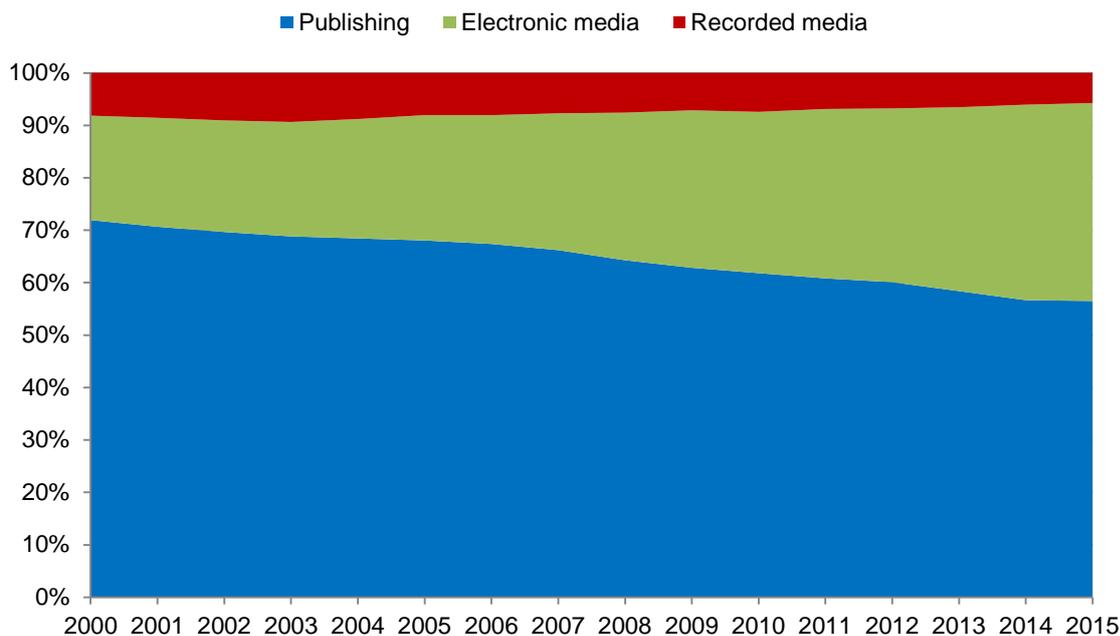
## Decline in the Finnish media market in 2015

Media Economy | Finland November 2016 | EH

**In 2015, the value of the Finnish media market continued downward. However, there was some growth in a few media sectors, particularly cinemas with a more than 25 per cent increase in sales. This is shown in Statistics Finland's annual overview on the Finnish mass media market.**

Last year, the value of Finnish media amounted to 3.7 billion euro. This was around 100 million or about three per cent less than in 2014. Nevertheless, there was an increase in sales for some industries, mainly cinemas (+ 26 per cent), but also Internet advertising (+ 7 per cent), book sales (+ 4 per cent) and commercial radio (+ 4 per cent).

## Shares of the Finnish media market by sector in 2000–2015 (per cent)



*Note:* Publishing includes newspapers, free papers, magazines and periodicals, and books. Electronic media includes TV and radio, plus Internet advertising. Recorded media refers to phonograms, DVD/VHS and cinema.  
*Source:* [Statistics Finland's media statistics table service](#) (Table 1.2)

Since 2000, the media market share of electronic media – TV, radio and Internet advertising – has doubled, from twenty per cent to nearly forty per cent. The media market share has grown through Internet advertising and particularly the TV business. On the other hand, the media market share of publishing – newspapers, magazines and books – has fallen from over 70 per cent to 57 per cent since the turn of the millennium. During the same period, the market share of recorded media declined from eight to six per cent.

[More information on Statistic Finland's website](#)

Statistic Finland's [media statistics table service](#)

**About the statistics:** The calculations presented here describe the mass media market at the end user level: for example, the figure on the newspaper market comprises retail price subscriptions and single copy sales of newspapers and their revenue from advertising. The figures cover domestic production and imports, but not exports. There is some overlap between Internet advertising and other media groups.

## Norway and Sweden: Savings keep newspapers in the black

Media Economy | Norway Sweden October 2016 | EH

**The newspaper industry is under pressure. Advertising revenues continue to fall, and the continued profitability of most newspapers is explained by substantial cost cuts. At the same time, business is going relatively well for TV and radio. This is shown in two reports on media economy by the Norwegian and Swedish media authorities.**

The Norwegian Media Authority and the Swedish Press and Broadcasting Authority have each published an analysis of the domestic media economy in 2015. The reports analyse the development of newspapers, television and radio, looking at turnover and profitability at the industry level as well as for individual companies.

### *Major cost cuts keep figures in black*

The daily press is the sector most affected by the digital competition in the media market. In 2015, newspapers' total turnover declined in both Norway and Sweden (6 and 3 per cent)\*, and substantial cutbacks are behind the fact that most newspaper operations still report a profit. Even though both circulation and advertising revenue are on the decline, it is advertising that accounts for the largest fall; and it is especially print advertising that is plummeting. In 2015 Norwegian newspapers' print ad revenue decreased by 83 million Euro, and that of Swedish newspapers decreased by 69 million Euro.

### *Digital no compensation for print loss*

While newspapers' digital advertising is growing, it cannot compensate for the decline in print. In Norway revenue from digital advertising was up by just 1 per cent from 2014 (2 million Euro), and it was only slightly better in Sweden, with an increase of 11 per cent (19 million Euro). There are major differences between various newspaper categories, however. For the tabloids – the two newspapers sold in single copy in each country – the digital economy is particularly important. In both Norway and Sweden, around 70 per cent of the advertising revenue of the tabloid press is derived from digital channels. A Swedish comparative example is Mittmedia, a local newspaper group that has invested heavily in digital sales, which in 2015 had a digital advertising share of 16 per cent.

At the same time, reader payment for content is becoming increasingly important, even though the revenue is shrinking in monetary value. In Norway, where in 2015 the circulation revenues fell by nearly 2 per cent and advertising revenues by almost 11 per cent, for the first time income from circulation was greater than that from ads (49.4 per cent vs. 46.5 per cent).

### *Radio and TV in the black*

In 2015 commercial radio strengthened its profitability in both countries, and advertising sales increased. For the TV industry, advertising increased slightly in Norway but declined in Sweden. The commercial TV industry, which consists of a few dominant players in each country, is profitable, but is facing challenges like intensifying competition from global streaming services and escalating prices for broadcasting rights, particularly sports.

\* Newspapers' total revenue in 2015 in Norway 1.422 million Euro; in Sweden 1.801 million Euro.

## **About the reports**



**Økonomi i norske medievirksomheter 2011-2015** [Economy in Norwegian media operations 2011-2015] is the Norwegian Media Authority's annual report on the media industry's economic development, with a focus on news and current affairs media. Data are primarily based on the Authority's own data collections plus Norwegian media companies' official annual accounts and reports. The report is published in Norwegian.

[Read more and download](#) (in Norwegian)



**Medieekonomi 2016**, written by Jonas Ohlsson PhD from NORDICOM, is part of the report series *Medieutveckling* [Media Development] published by the Swedish Press and Broadcasting Authority. Data are primarily based on Swedish media companies' official annual accounts and reports. The report will be published on an annual basis, and is available in Swedish.

[Read more and download](#) (in Swedish)

# Media Policy

## Media VAT in the Nordic countries

Media Policy | Nordic November 2016 | EH

**In a new proposal, the European Commission suggests identical rules for value-added tax (VAT) on print and digital papers and books. Norway abolished VAT on digital news in March this year, but what is the situation in the other Nordic countries? Nordicom has mapped the VAT rates for the media sectors in the five Nordic countries.**

In all the Nordic countries, the media are financially supported through lower or zero VAT rates. Print media, TV/radio licence fees and cinema tickets often have lower or zero VAT, while digital versions of newspapers, magazines and books are subject to standard VAT – with the exception of Norway, where digital news is VAT-exempt from March 1, 2016. In Denmark, which stands out with no differentiated tax levels, all media except print newspapers have full VAT.

*Only newspapers have low VAT in all Nordic countries*

Print newspapers comprise the only medium with a lower VAT level in all countries. Iceland and Sweden have a lower VAT rate on all newspaper sales, while Finland has lower VAT on subscriptions to newspapers and magazines but the standard rate on single-copy sales.

In Denmark newspapers are exempt from VAT, but must pay a fee calculated based on revenue from print newspaper sales. In Norway newspapers are also without VAT, which since March 2016 also applies to online news.

*EU makes platform-neutral VAT possible*

VAT on digital products, such as online magazines and e-books, is governed by [EU rules](#). On December 1st, the European Commission presented [a proposal](#) to allow member states to align the rates for e-publications with those for printed publications. The proposal is part of a review of the entire VAT system in the EU, to be completed in 2017.

Download Nordicom's overview (from the table database):

[Value added tax rates for media in the Nordic countries 1997-2016 \(PDF\)](#)

[Value added tax rates for media in the Nordic countries 1997-2016 \(Excel\)](#)

Read more: [European Commission: Press release 01.12.2016](#)

[European Commission: Action Plan on VAT](#)

[Ministry of Finance in Norway: News 19.02.2016](#) (in Norwegian)

## Norway to start closing down FM network early 2017

Radio | Norway November 2016 | EH

**Next year, nationwide radio in Norway will go fully digital. The FM transmissions will be closed down county by county, starting in January 2017. Most local radio stations will be able to continue on the FM network until 2022.**

In early 2011, the Norwegian Government submitted a [government bill on digital radio](#) which ruled that the FM network could be closed down by 2017. The digital switchover was subject to a number of conditions, however: the digital network should expand to the same coverage as the FM network; listeners should be offered added value through supply and technology; half of the listening should take place on digital platforms; and there should be suitable solutions for DAB radio in the car.

In April 2015, the Norwegian Government [decided that the conditions had been met](#) and that the nationwide radio (including the large commercial networks in the cities) should be fully digital from 2017 on. The analogue network will be shut down county by county, starting on January 11th. The local radio stations, which will continue on FM, have recently [been granted extended FM concessions](#), which will last until December 31st, 2021.

More information (in Norwegian) at the [Norwegian Media Authority's website](#) and in a [status report published in October by Digitalradio Norge](#) (owned by NRK and MTG/P4).

More reading (in English): [Digital Radio 2016 – European market report](#) published by the EBU. [Norwegian radio channels 2016](#), overview by medianorway

## Five future scenarios from the Danish Public Service Committee

Public Service | Denmark November 2016 | MVK

**On November 7, the Danish Public Service Committee published its report on public service in the new media reality. In it, they propose five future media scenarios that include both a disappearance of public service funding and a strengthening of the largest public service institution in Denmark, DR.**



Danish politicians assigned the Committee with the task of drafting different possible scenarios for how public service could and should look on all platforms, such that it would continue to contribute to the democratic debate and to our common frame of reference. The Committee has chosen to solve its main task by drafting five basic scenarios and illuminating their respective strengths and weaknesses.

The intention is to offer decision-makers a foundation for making informed choices: For example, if you strengthen the market and weaken public service, what is gained and what is lost? Or what happens if you completely remove public service institutions and instead make it possible for all media institutions to apply for public service funds?

### *The five scenarios*

- Scenario 1: Public service left to the market: All public service funding ceases. The publicly owned public service institutions are closed or sold.

- Scenario 2A: Public service remains – but institutions perish: Foundation model – public financing of individual programmes, series and Internet services.
- Scenario 2B: Public service remains – but institutions perish: Concession model – laying out entire channels and platforms to the market.
- Scenario 3: Public service concentrated in DR: by reducing the number of public service institutions, more space is given to commercial media companies.
- Scenario 4: Public service limited: Public service media address only the content that the commercial media sector is unlikely to provide.
- Scenario 5: Public service strengthened in Danish: Public service media place more emphasis on Danish content.

### *No recommendations*

The Committee's Chairman, Connie Hedegaard, says: "We haven't been asked to make recommendations. And the scenarios can be combined in many ways. But our hope is that the nuances of this difficult debate can receive more space, and that policy-makers have gotten a qualified foundation for making some informed choices."

Download:

[The Public Service Committee's report](#) – in Danish (PDF)

[The annex to the Public Services Committee's report](#) – in Danish (PDF)

The report by RiSj, [Analysis of the Relationship Between and Impact of Public Service Media and Private Media](#), in English, summary in Danish (PDF)

**About the report:** The Public Service Committee was established at the beginning of 2015 to follow up the Danish Media Agreement for 2015-2018. The Committee has had the task of drawing up a basis for reflection on the public service media's role in the coming years. As part of its work, the Committee has received input from many different stakeholders. In addition, the [Reuters Institute for the Study of Journalism \(RiSj\)](#) at the University of Oxford was commissioned by the Committee to conduct a meta-analysis of relevant studies on the interaction between public service and private media with regard to these media institutions' overall contribution to society awareness, development and cohesion. Read more [about the Public Service Committee's work on its website](#).

## Swedish inquiry suggests platform-neutral media subsidies

Media Subsidies | Sweden November 2016 | EH

**The Swedish press subsidies should be replaced with a broader media subsidy. In addition to printed newspapers, the digital media, free media, and news agencies would also be able to receive financial support for news production. This is recommended by the government media inquiry.**



The Swedish media inquiry has presented its final report, suggesting that a new media subsidy come into effect on January 1, 2018. The support should be open to all general news media, regardless of type and distribution form.

### *Thresholds to entering the support system*

In order to receive support, a number of basic requirements must be met. At least 60 per cent of the content is to be editorial and at least 20 per cent self-produced, which is slightly stricter than the requirements for today's press subsidies. The media should be generally accessible to all, have a publisher, direct themselves to a Swedish audience,

and have a publication frequency of at least 45 issues/broadcasts per year. Moreover, the inquiry suggests a set of assessment criteria: that the journalistic content should be pluralistic, hold high quality, and be based on democratic values.

#### *Lower thresholds for some media*

Lower requirements would apply to news media that cater to national minorities, as well as to start-up media as well as news and photo agencies. And additional support should be available to media wanting to create local journalism in insufficiently covered areas, as well as to those wishing to adapt their content to people with disabilities.

#### *Media competence needed for quality assessment*

A Media Subsidy Council should be set up to manage the support, and a majority of its members should be nominated by the media industry. The reason for this, according to the inquiry, is that defining journalistic quality will require media-savvy people, and such an assessment must also be kept independent from politics.

#### *Increased subsidies*

As the proposed system allows more media actors to apply for subsidies, it will likely require more money. The inquiry therefore proposes an increase of the support from 576 million to 732 million SEK in 2020. As for the sums directed to a certain media organization, they should be calculated on its costs for news production instead of on its paid circulation, as is the case today.

#### *Suggestions for further steps*

The government investigator also includes a number of “media political sketches” to highlight other current media policy issues. The sketches include, among other things, proposals to invest in media and information literacy, to strengthen the digital infrastructure, and to sharpen penalties for threats to journalists. Moreover, the investigator suggests an inquiry to identify new financing possibilities for the media, as well as an inquiry regarding a new public service company that would produce news for other channels and in areas where the commercial market is not enough.

Below you can find the final report and a memorandum on media policy conclusions and visions, presented on November 7, 2016 (in Swedish):

[En gränsöverskridande mediepolitik. För upplysning, engagemang och ansvar \(SOU 2016: 80\)](#)

[Memorandum: Mediepolitiska slutsatser och visioner \(PDF\)](#)

[The media inquiry website](#)

**More about the inquiry:** In March 2015, the Swedish Ministry of Culture and Democracy initiated an inquiry into “A media policy for the future”, aiming to analyse the need for new media policy tools when press subsidies in their current form cease. The inquiry’s proposals should aim to promote opportunities for the public to access journalism that is characterised by diversity, objective news, quality and depth, regardless of where in Sweden one lives.

**The inquiry has published a number of reports** (in Swedish):

November 2015: [An analysis of the Swedish media landscape from a citizen's perspective: "Medieborgarna & medierna"](#) (SOU 2015:94)

March 2016: [A memorandum on publicly funded media](#)

April 2016: [A research anthology: "Människorna, medierna & marknaden"](#) (SOU 2016:30)

August 2016: [A citizen survey conducted by Statistics Sweden](#)

## Internet freedom on decline

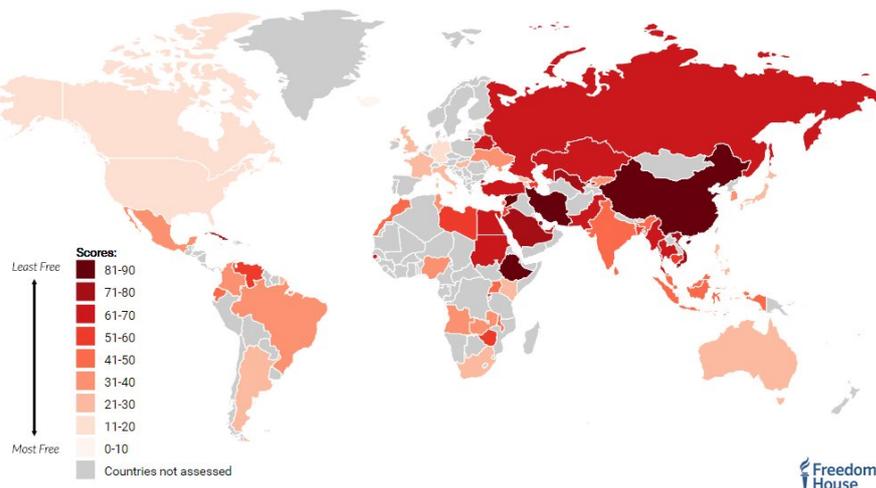
Internet | International November 2016 | EH

**Internet freedom around the world declined for the sixth consecutive year in 2016, according to a report by Freedom House. Iceland, the only Nordic country in the study, is rated as a global leader in free speech.**

The 2016 Freedom on the Net report shows that more governments are aggressively targeting social media and communication apps than ever before. Among Internet users, two-thirds (or 67 per cent) live in countries where criticism of the government, military, or ruling family was subject to censorship. A quarter, 27 per cent, live in countries where people have been arrested for publishing, sharing, or merely “liking” content on Facebook.

The report also points out that a number of countries, including democratic states, have passed laws that limit privacy and authorize broad surveillance, citing national security as an argument.

Freedom on the Net 2016 Overall Scores



Source: Freedom on the Net 2016, Freedom House

### Icelandic country report

Iceland has one of the highest rates of Internet and social media usage in the world, and Internet and digital media play a vital role in society there. In this study, in which Iceland is the only Nordic country included, the country is rated as “Free” and presented as an international leader in promoting free speech. The country profile covers, e.g., the ICT market, regulatory bodies, and the legal environment.

[The report is available here](#)

[Country report for Iceland](#)

[About the Freedom on the Net series](#)

**About the report:** Freedom on the Net 2016 covers 65 countries – accounting for almost 90 per cent of Internet users worldwide – in six regions around the world. The countries were chosen to illustrate Internet freedom improvement and decline in a variety of political systems. The numerical ratings and reports include a focus on developments that took place between June 1, 2015 and May 31, 2016. Read more [about Freedom House](#).

# Media Use

## Media development in Denmark in 2016 – English summary

Media Use | Denmark November 2016 | MVK

**The young and elderly populations have moved in opposite directions in traditional media consumption – a decrease for the young and an increase for the elderly. At the same time, the elderly are well on the move in using digital media. An English summary of the Media development in Denmark report is now available.**

The 2016 edition of the annual report on media development, published by the Danish Agency for Culture and Palaces, focuses on media consumption. It concludes that age is very much the deciding factor when it comes to media use.

### *TV viewing – a social thing for the young*

In 2015, the Danes watched traditional TV on average for 172 minutes a day, only one minute less than the year before. However, among the young traditional TV consumption has continued to decline. From 2010 to 2015 it fell by as much as 71 minutes – corresponding to more than 50 per cent (in 2014–2015 it fell by 12 minutes). In turn, TV viewing has increasingly become a social thing for the young – that is, it is something they do with others rather than alone. The share of the population streaming films, series or TV programmes daily/almost daily has risen from 12 to 15 per cent.

### *Increase in radio listening*

In 2015, for the first time since the current measurements of radio listening in Denmark began in 2008, there has been an increase in the average daily listening time. Throughout the period 2008 to 2014, daily listening fell continuously and the overall decline in the period was a total of 15 minutes. From 2014 to 2015, the trend reversed and listening increased – for a while at any rate. This growth is explained by increased radio listening among the oldest age group, 70 years and over. Most people still listen via the FM band, but there is an ongoing decrease in FM listening and an increase in digital listening.

### *Readers' eschewal of printed newspapers has slowed*

The trend for printed dailies in the period 2010–2015 was characterized by a continuous decline in readership figures. However, in the period 2014–2015, for the first time in several years, the majority of newspapers have either put a stop to the decline in their readership or have experienced a more limited decline than in previous years. The largest drop in the reach of print newspapers has been among the youngest readers.

### *Largest online increase among the elderly*

The share of the Danish population that uses the Internet on a daily basis has steadily increased in recent years, as has the share using smartphones to go online. Approximately nine out of ten in the younger population use a smartphone for Internet access, compared to around three in ten of 75–89 year olds. However, even though the oldest population group still exhibits significantly lower use of the Internet and of smartphones to access the Internet than the youngest users, it is in this section of the population that we see the greatest growth rates.

Download: [The media development in Denmark in 2016 \(PDF\)](#)

[All English summaries are available here](#)

The full report in Danish: [Mediernes udvikling i Danmark 2016](#)

**About the report:** This is the third edition of the Danish Agency for Culture and Palaces' "Report on media development in Denmark". As in previous years, this year's report was compiled in consultation with an external editorial panel, consisting of seven expert media professionals, researchers and industry representatives.

## One in four Danes does not actively seek news

News Consumption | Denmark November 2016 | MVK

**A new report reveals Danish citizens' sources of knowledge and news. Among other things, it shows that TV remains the main provider of news, that nearly one in four Danes does not actively seek news, and that there is a relationship between higher news consumption and having discussed politics in one's family while growing up.**



The number of media and news sources in society has increased substantially. How do citizens choose their media mix and why, and what does this mean for Danish knowledge about societal conditions? These questions are dealt with in a new study by the Danish Agency for Culture and Palaces.

### *Six types of news consumers*

The survey identifies six types of news consumers – the superficial, the well-informed, the interested, the dutiful (each group representing about a fifth of the population); and the uninvolved and the socially correct (each representing around 10 per cent) – and shows that these six segments have very different motives for their engagement in news and ways of consuming it.

The results show that knowledge about news and the current conditions in society is linked to the consumption of news and current affairs. For example, the interested – who find it important to keep abreast of society debate, actively seek news, and would pay for quality news online – score the highest on the study's knowledge test. For the uninvolved, who score the lowest on the knowledge test, news is more pastime and entertainment, and they do not actively seek news in their everyday life.

### *Generation divides in news consumption*

The report confirms different media consumption patterns between generations. Young people seek out and use news across different platforms, while older people use traditional media, which they also consider to be more reliable than online media. Age also affects the prioritization of news: the older you are, the more important news is to you.

Looking at the whole population, TV remains by far the main provider of news and current affairs, even though the young are much more oriented towards digital and social platforms. While nearly one in four Danes does not actively seek news and current affairs material, for the majority of Danes news and current affairs constitute an important part of their daily media consumption.

The report also identifies a relationship between higher news consumption and having discussed politics around the dinner table while growing up.

[Find the report with annexes, questionnaire and data](#) (in Danish)

[Download the report directly](#) (PDF in Danish)

**About the study:** The study, part of the Agency for Culture and Palaces' reporting on media development in Denmark, was performed by Mindshare . The study is based on an initial qualitative study of 13 in-depth interviews and a quantitative web-based survey in a citizens' panel, consisting of a representative sample of the Danish population aged 15 and over. A total of 7,514 interviews were conducted in the quantitative study. Read more about Danish media consumption in the reports on [media development in Denmark](#) (see previous article).

## Young people's news consumption in Norway

News Consumption | Norway November 2016 | EH

**Nine of ten young Norwegians check out the news every day, often several times a day, and the smartphone stands out as their main source of news. These are some of the results of a survey of young people's news consumption in a digitized everyday life.**



The National Institute for Consumer Research (SIFO) has published a report on 16-25-year-olds' news consumption via smartphone, social media and news aggregators. The main focus lies on the smartphone's role in young people's news consumption. The survey shows that two of three 16-25-year-olds are interested or very interested in news, and nine of ten check out the news on a daily basis.

As for devices, the smartphone has become the main platform for their news consumption, closely followed by a PC/Mac. Moreover, young people prefer going directly to the news via web browsers, rather than downloading apps from the news sources.

Nine of ten young Norwegians use Facebook daily, which makes it by far the most popular social media. Two-thirds have chosen to "like", follow or subscribe to news services on Facebook, even though half of the young Norwegians claim that social media is never their first option for checking out news. At the same time, almost half say that news stories in social media make them more interested in news. A third of the 16-25-year-olds sometimes read, watch or check news from news aggregators.

[Read more and download the report here](#) (in Norwegian)

[About the National Institute for Consumer Research](#) (in English)

**About the survey:** The survey of young people's news consumption was conducted by Norstat during November-December 2015. The respondents comprised 805 people aged 16-25. The report also includes a literature review and a compilation of studies on news consumption in Norway and abroad.

# The Swedes and the Internet in 2016

Internet Use | Sweden September 2016 | KH, EH

**On average, the Swedes use the Internet 24 hours a week, and the Internet has become the most important source of information. This is reported in the *The Swedes and the Internet 2016*, the annual report produced by the Internet Foundation in Sweden (IIS).**



Access to the Internet in recent years has been stable, at just over 90 per cent. However, the time spent online continues to grow. The average Swede now uses the Internet almost 24 hours a week, an increase of just over two hours compared to last year. Nine of these hours are on the mobile phone. Young men aged 16 to 25 years are particularly active, spending an average of nearly 40 hours a week on the Internet. The explanation lies in increased access to mobile devices, such as smartphones and tablets.

## *Increase in streaming services*

The streaming of movies and TV shows has increased from 28 to 38 per cent, while comparable services for music are at the same levels as last year (44 per cent). YouTube is the most popular site for all ages. Indeed, 100 per cent of the young aged 11–19 years old watch YouTube.

## *More people search for news online*

Half of the population look for news online every day. For the younger ages, the Internet has been the most important information source for many years, but now, for the first time, this applies on average to all users. Among the young aged 16–25 years, Facebook is considered a more important news source than TV, radio or daily newspapers.

Read more

[The Swedes and the Internet 2016](#), English summary

[How Swedes use social media 2016](#), English summary of an excerpt of the report

[The full report](#), in Swedish

**About the survey:** “The Swedes and the Internet” is an annual individual survey on Internet use, which was conducted the first time in 2000. This year’s survey lasted from February to April. The principal for the study is the [Internet Foundation in Sweden](#) (IIS). “Swedes and the Internet” is the Swedish part of the [World Internet Project](#), an international research project that follows the Internet’s spread and use around the world.

## **More reports on the Internet and the information society, in English:**

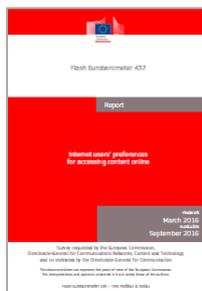
- [Measuring the Information Society Report 2016](#) [International Telecommunication Union]
- [Privacy, Free Expression and Transparency](#) [UNESCO’s Internet Freedom Series]
- [Children and Parents: Media Use and Attitude Report](#) [British Ofcom’s annual report on children’s media habits]

See our [Further Reading section](#) for links to reports on media trends in the Nordic countries, Europe and internationally. (If you read Scandinavian, see [Rapporttips](#) for more links.)

# EU study: How do people access media content online?

Internet Use | Europe September 2016 | EH

**A new Eurobarometer survey shows how 15- to 45-year-olds use the Internet to access media content. Finland, Denmark and Sweden top the league in using professional streaming services to access music, films and TV series online. Finland and Sweden rank high in reading digital news via newspaper websites or apps.**



This EU study shows that seven in ten Internet users aged 15 to 45 use the Internet at least once a week to read news, six in ten listen to music, and more than half watch films or TV series. Nearly eight in ten use free services to access content, but other criteria are also important, such as good audio or video quality or the possibility to access content without having to go through a registration process.

## *Reading news online*

Four in ten prefer to access news in digital format via the websites or apps of newspapers or magazines, which makes it the single most popular way to access news online. However, the majority of people looking for news – almost six in ten – now turn to other services: roughly 20 per cent access their news mainly via social media and through search engines, respectively, and 14 per cent do so via news aggregation services. The survey shows that accessing articles on newspaper or magazine websites or apps is the most common in Finland, Luxembourg, Estonia and Sweden (approximately two-thirds of the respondents who access news in digital/electronic format).

## *Watching films and TV series*

To watch TV series and films online, the people interviewed first turn to free or paid professional film and TV series streaming websites (25 per cent), then to video sharing websites and broadcasters' online TV services (around 20 per cent, respectively). The 15-to 24-year-olds are more likely to use the Internet to watch TV series and films than are older age groups. In ten countries professional streaming services are used the most, with Finland, Denmark, Luxembourg and Sweden at the top (38-44 per cent). Using broadcasters' online TV services as a main choice for watching film/TV online is the most common in the UK (30 per cent), followed by Finland (24 per cent).

## *Listening to music*

Video or music-sharing websites are the most popular way for people to listen to music online, with nearly a third of all respondents using them the most. Second most popular are professional music streaming services, either free or paid (22 per cent); online radio stations (16 per cent) and social media (14 per cent). The 15- to 24-year-olds listen to music online more often than the 25- to 45-year-olds do. Professional music streaming services are the most popular in Sweden, Finland and Denmark (46, 43 and 37 per cent).

[Press release, European Commission 14/09/2016](#)

[Flash Eurobarometer 437: Internet users' preferences for accessing content online](#)

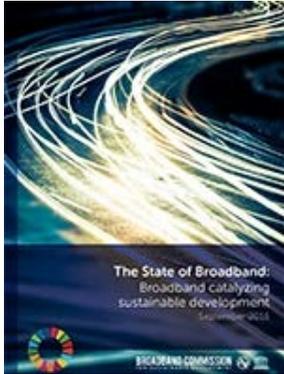
[Nordic Internet users' most preferred platforms/services for accessing news, film and TV series and music online 2016](#) (Excel file from Nordicom's table database)

**About the survey:** This study was carried out between 10 and 21 March 2016 by the TNS Political & Social Network in 28 EU member states. The figures are based on some 13,500 Internet users aged 15 to 45 years. They were interviewed online after having agreed to participate in the survey by telephone. As the survey is carried out in the EU only, Iceland and Norway are not included.

## Half the world's population is still offline

ICT | International November 2016 | EH

**Internet access is approaching saturation in the developed world. At the same time, however, half the world's population is still offline. Iceland and Finland are world leaders in Internet use and mobile broadband subscriptions, respectively. All this according to the report State of Broadband 2016.**



ITU/UNESCO Broadband Commission has published its annual broadband connectivity report. It shows that globally, an estimated 3.9 billion people – 53 per cent of the world's population – are not using the Internet. But the countries in which these offline populations are concentrated are few.

For example, three nations with huge populations – China, India and Indonesia – together account for 45 per cent of all unconnected people. The findings suggest that targeted efforts in a few key markets could help in redressing the digital divide between those who are online and those who are still offline.

### *Iceland global number one in Internet use*

Among the Nordic countries, Iceland stands out as having the highest share of individuals using the Internet worldwide (98 per cent), with Norway and Denmark close behind, ranking third and fourth.

Finland has the world's highest share of active mobile broadband subscriptions, with 144 subscriptions per 100 people. Sweden and Denmark are sixth and seventh. Denmark is also one of seven economies – in fourth place – where fixed broadband penetration exceeds 40 per cent.

### *Five key targets for global ICT development*

The Broadband Commission measures the ICT development against five key targets: growth in the number of countries with national broadband plans; making broadband affordable; connecting homes to broadband; getting people online; and achieving gender equality in access to broadband.

Among the positive results in this year's report are an increasing number of national broadband plans and a growing global share of broadband households. On the negative side is a slightly widened gender gap, as well as the observation that few of the least developed countries have succeeded in making broadband affordable.

[Read more and download the report](#)

**About the Broadband Commission:** The Commission was established by ITU and UNESCO in 2010, in response to the UN's call to step up efforts to meet the Millennium Development Goals. Following the adoption of the [UN's Sustainable Development Goals](#) in September 2015, the Commission was re-launched as the Broadband Commission for Sustainable Development to showcase and document the power of ICT and broadband-based technologies for sustainable development. The Commission embraces a range of different perspectives in a multi-stakeholder approach to promoting the rollout and use of broadband for development. [Read more](#)

# The Book Market and Reading Habits

## Reading trends in Sweden: Do we still read books?

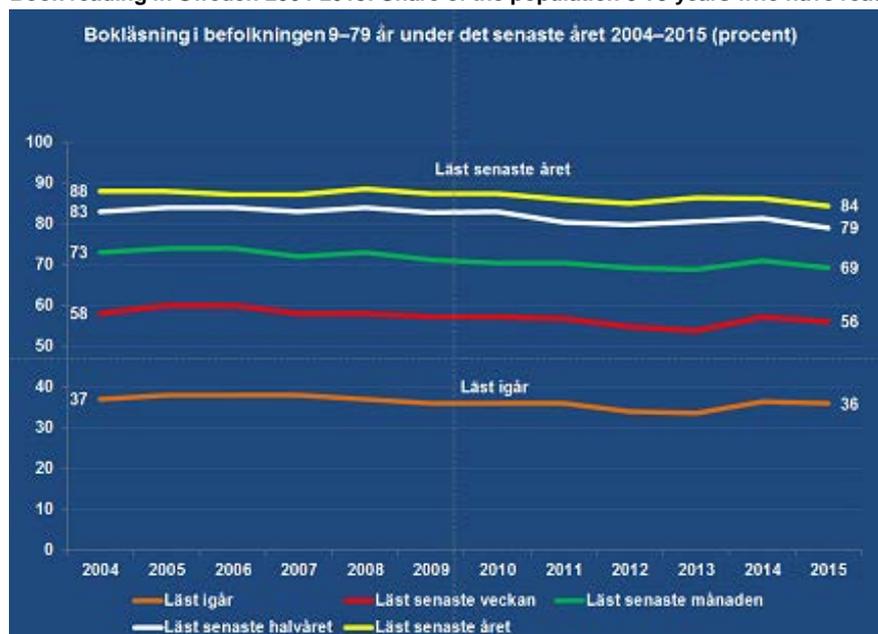
Books | Sweden November 2016 | UF KH

**Is there room for the book in the digital media landscape? Or have we ceased reading books? These are some of the questions a short book trends report, based on Nordicom-Sweden's Media Barometer surveys, seeks to answer.**

On average, Swedes spend six and a half hours on media use daily. Not surprisingly, the Media Barometer surveys, spanning over almost four decades, show a shift in media use towards digital platforms. Today, for example, more people read the evening newspaper online than on paper, and, particularly among the young, watching moving images online and using social media are increasingly popular. But reading digital books is still quite rare.

More than a third of Swedes read a book the average day, a level that has remained rather stable over the years.

**Book reading in Sweden 2004-2015: Share of the population 9-79 years who have read a book 2004-2015 (per cent)**



Orange: Read a book yesterday / Red: Last week / Green: Last month / White: Last six months / Yellow: Last year.  
Source: Nordicom-Sweden's Media Barometer surveys.

### *Differences between readers of e-books and printed books*

A majority of readers choose a printed book: of the Swedish population, only 2 per cent read an e-book and 6 per cent listen to an audio book the average week. There are differences between the typical reader of e-books and the typical reader of printed books. A reader of e-books is more often a man, aged 25-44 years, living in a household with no children. The largest groups of paper book readers are schoolchildren or pensioners; and women read books on paper to a greater extent than men.

### *Readers of e-books keen on digital media*

The typical readers of e-books are avid consumers of other digital media as well. They use social media, read newspapers and consume other news online, and watch TV on their tablets or smartphones. They do not use specific e-book readers, however. These results, together with other surveys, suggest that multifunctional devices such as tablets and smartphones are positive for all digital media use, such as videos, podcasts, and books. They are part of the digital media consumer's media mix, and make media easily accessible.

Download [Läser någon längre?](#) (PDF in Swedish)

**Data are extracted from** Nordicom-Sweden's Media Barometer, an annual survey that analyses daily media use on different platforms among Swedish inhabitants between 9 and 79 years of age. Its purpose is to describe tendencies and changes in media use. The first survey was conducted in 1979. The main report is in Swedish, but some of the results are [published in English online](#).

## Report on the Danish Book Market 2016

Books | Denmark October 2016 | EH

**The Danes' reading habits are generally stable. As for the Danish book market, more literature than ever is being published and the number of new publishers has increased, according to a new report.**



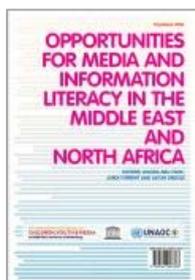
For the second year, the Danish Book and Literature Panel has published an annual report casting light on the Danish book market. The Panel presents statistics and analyses in relation to the production of books; developments in the Danish publishing landscape; distribution of books from publishers, bookstores and public libraries; and the reading habits among the Danish population. An English version of the report is planned for the end of 2016, and we will report more about this when it is available.

Download the report [Bogen og litteraturens villkår 2016 \(PDF\)](#), in Danish

Read [last year's report Books and literature 2015](#), in English

## Anthologies from Nordicom, Open Access

### Opportunities for Media and Information Literacy in the Middle East and North Africa



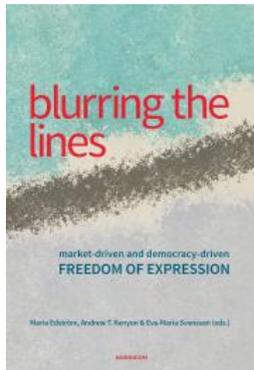
This seventeenth Yearbook from the International Clearinghouse on Children, Youth and Media, at Nordicom, is published in cooperation with [UNESCO](#) and [UNAOC](#) (United Nations Alliance of Civilizations). It fills a gap in the existing body of literature about the progress of media and information literacy work in different parts of the world. Editors are Magda Abu-Fadil, Jordi Torrent and Alton Grizzle.

[Read more and download the yearbook](#) (published in English and Arabic)

[All publications in the Clearinghouse Yearbook series](#)

## Blurring the Lines

### Market-Driven and Democracy-Driven Freedom of Expression



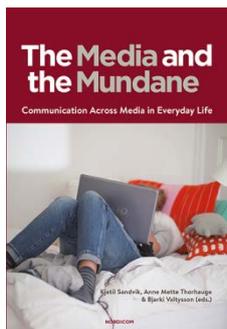
*Blurring the Lines: Market-Driven and Democracy-Driven Freedom of Expression* focuses on challenges from the market to free speech and how free speech can be protected, promoted and developed when lines between journalism and advertising are blurred.

With contributions from 20 scholars in law, media studies and philosophy, it explores an issue deserving greater attention, market pressures on freedom of expression. The role of commercial constraints on speech, restrictions and control of media content and the responsibility of state institutions in protecting free speech are some of the topics scrutinized from a democratic free speech perspective. Editors are Maria Edström, Andrew T. Kenyon, Eva-Maria Svensson.

[Read more and download the publication](#)

## The Media and the Mundane

### Communication Across Media in Everyday Life



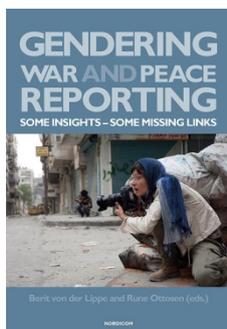
This book provides a variety of cases and theoretical insights that touch upon communication across media in everyday life. The cases favour user perspectives and are focused on coordinating mundane activities on smartphones, the role played by apps when exercising, the use of self-organised Facebook groups for civic participation, the role various cross-media communication patterns play in the everyday practices of bereaved parents, the framing and use of digitized cultural heritage, and the political everyday life appropriations of users on social media. While the cases are empirically grounded, the theoretical insights provide different frameworks for understanding cross-mediated communication patterns

and space of agency in everyday contexts. Editors are Kjetil Sandvik, Anne Mette Thorhauge and Bjarki Valtysson.

[Read more, order or download the publication](#)

## Gendering War and Peace Reporting

### Some Insights – Some missing Links



War reporting has traditionally been a male activity. Elite sources like politicians, high ranking military officers and state officials are collectively still dominated by men, and it will take more than the presence of an increased number of female journalists to change this male hegemony. There is, though, no deterministic link between sex/gender and more peaceful news or a more peaceful world.

This book offers analytic approaches to how traditional war journalism is gendered. Through different case studies, the book reveals how the framing of different femininities and masculinities affects the reporting and our understanding of war and conflicts. Editors are Berit von der Lippe and Rune Ottosen.

[Read more, order or download the publication](#)

# Research Journals, Open Access

## Research journals from Nordicom

Media Research | Nordic November 2016

Nordicom publishes two journals, both issued twice a year. **Nordicom Review** is a traditional scientific journal in English, applying double-blind peer review. **Nordicom-Information** is popular scientific and thematic, mainly in the Scandinavian languages.



### Nordicom Review 2/2016

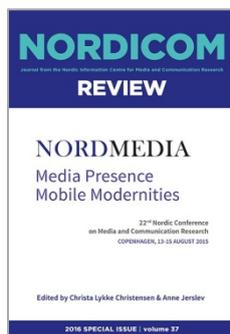
[The whole publication](#)

Some reading tips:

[Commenting, Sharing and Tweeting News. Measuring Online News Participation](#) [Susanne M. Almgren & Tobias Olsson]

[The Prism of Change. 'Continuity' in Public Service Television in the Digital Era](#) [Hanne Bruun]

Read Nordicom Review's [latest articles, published as online-first](#)



### Nordicom Review Special Issue 2016

NORDMEDIA: Media Presence – Mobile Modernities

In August 2015, the 22nd Nordic conference on media and communication research, Nordmedia, was held in Denmark. The conference theme was *Media Presence – Mobile Modernities*. This special issue of *Nordicom Review* includes key note speeches, presentations by participants in the plenary panels, and a selection of articles based on papers presented at the conference. Editors are Anne Jerslev & Christa Lykke Christensen. **To be published in December 2016:**



### Nordicom-Information 2/2016

Theme: Digital Storytelling

Storytelling has been part of all cultures, in all times. As digital technology has changed the way we communicate, new opportunities have been created for which stories can be told, who can make them heard, and how they can be formed.

This issue of *Nordicom-Information* deals with stories from different aspects, looking at: how technology and market development have created new production

and consumption forms for storytelling; altered forms of expression and aesthetics in a digital environment; and the ability of the narrative to create community and identity in different ways.

Editors are Maarit Jaakkola, Ragnhild Mølster and Ingela Wadbring.

[Read more, order or download the publication](#)

## Nordicom Review continues to develop

Media Research | November 2016 | IW

**In November 2016, Nordicom Review's new editorial board was completed. This is one of many steps taken during recent years to further develop the journal into one of a clear international standard.**

With the new board, Nordicom Review is moving towards a more international profile. It includes an expansive range of competencies and experiences from all over the world. Most members originate from the Nordic countries and are affiliated either to a Nordic university or a university abroad. Austria, the Netherlands, Hong Kong, France, South Africa and Indonesia are examples of countries represented on the board.

A member of the editorial board is expected to support the journal, help to develop it and to find reviewers in their specific research area when necessary. Editorial board members are invited to serve on the board for a period of four years.

**Nordicom Review**, which was launched in 1980, moved to peer-review in the 1990s and since then has seen several other changes:

- New aims and scope, as well as new guidelines and a new review form
- Online first has been introduced, in order to shorten the time between acceptance and publication
- An assistant editor has been appointed (Jonas Ohlsson, Nordicom, Sweden), as well as a senior advisory editor (Bob Franklin, UK)
- All articles undergo plagiarism checks before being sent out for review
- Last but not least, in November 2016 a new editorial board was completed

[The Editorial Board](#) (choose heading on the page) | [About Nordicom Review](#) | [The latest articles](#)

## Extra funds to develop Nordicom's media use survey

Media Use | Sweden November 2016 | KP

**When the Swedish government's budget for 2017 was presented in September, Nordicom was allocated an additional 500,000 SEK. This money will be used to develop Nordicom's annual media use survey.**

Since 1979, the Swedes' media consumption has been tracked in the annual Media Barometer survey, covering everything from book reading to the use of computer games. This is a unique series of measurements, as it covers all media across all platforms, and is conducted by a non-profit organization.

*Increased resources offer the opportunity to develop*

- Over time, it has become increasingly difficult to carry out the kind of reach surveys which Nordicom's Media Barometer survey represents. The possibility to reach people on the phone, or asking questions that can be answered by both 9-year-olds and 79-year-olds, are some of the challenges, says Ingela Wadbring, Director at Nordicom.
- The increased resources offer, for instance, the possibility to test questionnaires in mobile devices to reach young people, and to test the significance of the questionnaires' length when it comes to people's willingness to respond.

[Read more about Nordicom-Sweden's Media Barometer.](#)

## Media Trends in the Nordic Countries

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Nordicom is an institution within the Nordic Council of Ministers.

Nordicom follows the Nordic media development with the aim to document and spread knowledge about media trends within, and about, the Nordic region within a European and global perspective. The newsletter *Media Trends in the Nordic Countries* covers issues such as media consumption, structure and policy, and reports on the latest developments and current research in the field.

The newsletter is scheduled to come out three times a year.

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