DR Audience Research Department’s annual report on the development of the use of electronic media in Denmark
You are not representative

Readers of Media Development are not representative. Some of you pay for digital long reads, cut your cables and tweet to your followers, that's a fact. But outside the media pond, there are Danes who still get their newspapers delivered to the door, have the full TV package and listen to the radio for several hours every day.
One of the most important events in our own little media pond in 2016 was the publication of the Public Service Commission’s report with scenarios for public service in the future. There was one point in the report in particular that had massive repercussions: the generation gap. The fact that there is currently an almost abysmal disparity between the media usage of the younger and adult generations. It is important to bear this generation gap in mind in any consideration of media consumption in Denmark, which several articles in Media Development 2016 do.

But it is not just between age groups that differences arise. There are also disparities within the individual age groups. We must not make the mistake of referring to everyone under the age of 30 as identical - or everyone over 50 for that matter. There are people in their 50s who stream away to their heart’s content, go full throttle on social media and who have adopted all the opportunities offered them by the new media reality. But there are also people under 30 who still listen to the radio (a surprisingly large number) and are still happy to watch traditional TV.

This is a challenge to everyone in the media industry, for if we believe that all Danes are like the average Dane or focus on one single development, we will fail to gain a fundamental understanding of how the different media interact. New and old, fast and slow, personal and common.

This is also apparent from articles in Media Development 2016. Yes, on-demand TV and social media are gaining ground, and we spread our media usage over several platforms. But we can also see that large communities on DR1 and TV 2 are coping well despite the increased use of streaming.

That, in spite of digital music services, young people continue to seek the radio’s ability to curate music and keep them in good company. And while most of us check the quick news reports during each break, we still have a need to get an overview of the news from the TV and daily papers.

When we talk about the development of the media, it is seldom a case of ‘either-or’ but often of ‘both-and’. The interesting thing is to a lesser degree guessing whether on-demand has killed off flow in ten years, but rather what role the two play for the individual user. For in media development the understanding of the user is all-important as a starting point.

And when you, dear reader, subscribe to Zetland, cut your cable and interact with your many followers on Twitter, just remember that there are also Danes who still read their printed newspapers, pay for the full TV package or listen to the radio several hours a day. For the readers of Media Development are by no means representative.

It is my hope that Media Development 2016 can help to add different nuances to your understanding of the use of the media in Denmark.

Dennis Christensen
Head of DR Audience Research
HOW MANY HOURS A DAY DO DANES WATCH TV ON AVERAGE?

Target group: 3+ years
Source: Kantar Gallup TV-Meter

2015: 2h 52 min
2016: 2h 38 min
Flow is strongest, but streaming is making its mark

Traditional TV consumption fell by 15 minutes in 2016, but Danes continue to spend 2 hours and 38 minutes in front of the television every day. Streaming services are eroding traditional TV usage and challenging the way we both measure and talk about TV.
Following a relatively quiet 2015, traditional TV watching fell by 9%, equivalent to 15 minutes, in 2016. If a minor change in the method used in the TV-Meter survey is taken into account, the actual drop is closer to 11 minutes. In parallel to the reduction in the time spent watching traditional TV, the weekly coverage on the medium fell from 90% in 2015 to 88% in 2016 among Danes with a TV in the household.

Younger viewers have reduced their TV consumption over several years. This development intensified in 2016, when 15-29-year-olds reduced the time they spent watching TV by over a quarter. TV watching was previously on the rise amongst the elderly, over 55 years of age, but now a decline can be observed amongst these viewers too. This is a determining factor that explains why the overall usage of traditional TV is again falling sharply.

Although TV watching amongst young people hit an all-time low in 2016, TV viewing amongst the entire population remains at a level that is reminiscent of what we saw prior to 2007, when TV watching in Denmark started to rise sharply. In a historical context, TV usage per Dane remains within the norm - and in spite of a decline in the coverage, traditional TV continues to be very widespread.

THE MAIN CHANNELS ARE BECOMING LARGER

In a declining market it is an occupation in itself to maintain a stable time consumption. The TV 2 and DR channels leave 2016 somewhat unaltered, as compared with 2015, with respect to time consumption per Dane, which, in terms of the proportion of viewers, results in marked increases. The TV 2 result of 37.8% is the best since 2011, while DR, with a proportion of viewers of 36.8%, has received its best result in the history of the viewer survey.

The progress is for both channel families run by the main channels DR1 and TV 2. The main channels were previously under pressure from the increased fragmentation, but in 2016 managed, nevertheless, to bring Danes together. Both channels have many of the qualities viewers associate with traditional TV. The great bake off contest on DR1 is a good example of this; it allows you to lean back and relax, while the whole family gather round to watch the same thing and everyone can talk about #gunnargate over breakfast the day after.

In addition, both DR and TV 2 have shown Summer Olympics and European football championship, which has taken the sting out of the fall in TV consumption. Moreover, both
HOW MANY HOURS A DAY DO DIFFERENT AGE GROUPS WATCH TV ON AVERAGE?

Source: Kantar Gallup TV-Meter

- 3+ years
- 15-29 years
- 55+ years

- 5h
- 4h
- 3h
- 2h
- 1h
- 0h

PROPORTION OF VIEWERS DIVIDED INTO CHANNEL FAMILIES

Target group: 3+ years
Source: Kantar Gallup TV-Meter

2015
- 10.7% MTG
- 10.3% Discovery Networks
- 34.0% DR
- 35.8% TV 2
- 6.5% Other

2016
- 9.1% Discovery Networks
- 9.8% MTG
- 36.8% DR
- 37.8% TV 2
- 6.5% Other
channel families broadcast a lot of news, which is one of the TV categories the Danes have cut back on the least.

A LITTLE COMING AND GOING

Strong main channels do not necessarily, however, swallow up the more specialised channels. DR2, DR3 and DR K have all had their best results so far in terms of viewer proportions, and on TV 2 most channels have experienced progress with the exception of TV 2 Zulu and TV 2 News, which enjoyed a remarkably strong 2015 on account of the Danish parliamentary elections and a number of major news events.

While the time consumption on the DR and TV 2 channels has fallen by 1% and 4% respectively, MTG and Discovery Networks have lost 16% and 20% respectively of the viewing on the many channels the two families have at their disposal. In terms of viewer ratios, this gives a 2016 result of 9.8% for MTG and 9.1% for Discovery Networks, against 10.7% and 10.3% respectively in 2015.

The reason for the decline is the reduction in the TV usage of younger viewers in particular, who have traditionally constituted the majority of the viewers of the commercial channels. At the same time, a lot of the content that is broadcast on, for example, TV3 and Channel 5 is in more fragile competition with, for example, Netflix or HBO Nordic, as opposed to DR and TV 2, which broadcast, relatively speaking, uniquely Danish content, which is not available on streaming services.

HOW BIG IS THE CAKE?

At the beginning of 2017 the TV survey, which for 25 years has helped to shape the way in which the TV industry talks about success and fiasco, has changed significantly. The new survey has done away with the difference between old and new forms of distribution. Whereas only traditional TV used to be measured, the survey now includes live streaming and time shifted viewing of content from flow channels and unique on-demand content.

This means that the industry must relate to new normal levels in 2017, and that the concept of TV is changing its character in earnest. TV and streaming have until now been regarded as more or less separate, but from now on the two terms will become more fused. At the end of the day, it is a matter of live images - regardless of whether the signal comes from an aerial on the roof or a Wi-Fi connection.

When we account for TV viewing in Denmark in the future, however, it will not include Netflix series, Facebook videos or video journalism from the daily press. The new TV survey measures what we regard as the Danish TV market, and this only includes content distributors, who have an interest in being part of a common measurement. Nowadays this only concerns the national actors with their roots in traditional broadcasting. From now on it will be possible to survey more TV than has hitherto been possible, but this is still far from everything. The media reality is complex, as is surveying it. How the cake should be sliced in relation to what is known as TV continues to be a source of debate.

In the last few years there has been no shortage of death threats against traditional TV. The coverage of what we used to regard as TV, i.e. a TV screen with an aerial or cable connection, is definitely declining. But before anyone sends traditional TV to its grave, it is worth noting that, while coverage has fallen by 2 percentage points, one fifth of everyone over 12 years of age watched live TV over a streaming service at least once a week in 2016. A fall in the coverage and consumption of traditional TV is not necessarily the same as a move towards flow TV’s demise.
HOW MANY HOURS A DAY DO DANES LISTEN TO THE RADIO ON AVERAGE?

Target group: 12+ years
Source: Kantar Gallup Radio-Meter
Radio listening falls again

After a slight increase in 2015, listening time fell again in 2016. Despite competition from streaming services and social media, radio listening is still strong and there are indications that listeners have become more adaptable. Podcasts are still for the few, however, although more people are becoming acquainted with the phenomenon.

By Dennis Christensen
DR Audience Research
The average Dane has cut down on radio listening over a number of years, but in 2015 listening rose for the first time in many years. In 2016 listeners again reduced their radio usage, which fell to 1 hour and 56 minutes a day.

The decline of approx. 4 minutes conceals the fact that DR has lost 5 minutes while both Radio24syv and the commercial radio stations have gained half a minute. For DR’s channels, it is mainly P3 and P7 Mix that are experiencing a reduction.

THE YOUNG ARE LISTENING LESS TO P3

The fact that both P3 and P7 MIX are experiencing a reduction also means that the fall in the listening time is greatest amongst young people. The 20-39-year-olds listened to the radio for 1 hour and 24 minutes every day in 2016, which represents a drop from 1 hour and 27 minutes in 2015.

It is easy to imagine that competition from digital services such as Spotify and Facebook have caused this development. But the fall in the listening time is not unambiguous, as the commercial radio stations are experiencing hardly any reduction – and Radio24syv is experiencing an even greater upsurge. With 92% of the 20-39-year-olds tuning into their radios every week in 2016, the media’s decline cannot be ascribed to media development and increased competition from digital services alone.

On the other hand, both P3 and P7 MIX have had different challenges with respect to content in 2016. The very popular programme Mads & Monopolet was moved from P3 to P4, and although the move cannot be blamed for all P3’s challenges, it has certainly not helped the channel to have its tent pegs torn out by such a popular programme. In 2015 Mads & Monopolet had an average of 685,000 listeners on P3, corresponding to a 30% share, which are high figures, but on P4, which is the country’s largest channel, the programme now has an average of 1,082,000 listeners and a 48% share.

AL LOT TO REMEMBER

There is, still however, a lot to remember about the radio market in 2016. P3 and P4 continue to be the largest channels by far in spite of the latter’s decline. Radio24syv, which was the ninth most listened to channel in 2015, overtook P7 Mix and Pop FM in 2016, and is the seventh most listened to channel this year.

Digital radio listening continues to increase. If you look at DR and Bauer Radio’s channels, which have a combined share of 84%, digital listening constitutes 36%, as compared with 31% last year. In this connection, digital listening should be understood as all listening apart from listening on FM. This is the politically accepted definition in the event of an analogue shut-off.

ON-DEMAND IS STILL FOR THE FEW

Podcasts continue to be the subject of much discussion, but the number of podcast listeners has still not risen enough to make it possible to talk about a widespread popular phenomenon. In 2015, 9% of the Danes listened to podcasts every week, and this figure did not increase in 2016. The proportion of Danes who say they do not podcast has, however, fallen from 68% to 64%. This may be saying something about the podcast phenomenon: there is no increase amongst those who use it frequently, but there are more and more people who are becoming acquainted with the phenomenon. Thus the next challenge for the media must be to convert some of the listeners, who are quietly familiarising themselves with the medium, to regular core-listeners of podcasts.

If we direct our attention to the download figures for programmes, there are no common industry standards for their calculation. Practically all providers of podcasts, however, report that more and more programmes are being downloaded on demand – and the growth percentages are comparable in spite of everything: in 2016 DR experienced a growth of 60% in the number of programmes downloaded on demand, and Radio24syv enjoyed an increase of 65%. Over and above this, it is important to bear in mind the undergrowth of more or less independent podcasts, such as Politiken’s collaboration with Third Ear or the many popular American and British podcast formats.

RADIO UNDER DEVELOPMENT

In 2016 radio fell back into its former rut with a slight decline. However, the decline is spread between a couple of channels and not the media as a whole, and hence it is not inconceivable that radio listening may be seen to rise again in the near future.

At the same time there is also something about the year’s radio listening that indicates that the trend of adaptable listeners will continue. Listeners have been able to switch between channels if their programmes are moved, and they actively seek news and talk radio channels when current events or debates arise. Hence there are indications in general that the radio medium is about to slip its reins and become a little less locked into formats, which have tended to restrict it for years.

It is difficult to state with certainty whether the cause of the changes are the new dissemination opportunities via podcasts or the medium’s simple and algorithm-free nature. What is perfectly clear, however, is that the FM waves are currently reaching high levels in the radio industry - the classic flow radio is about to transform our understanding of what radio is. Perhaps 2017 will be the year in which we experience a fresh increase in the listening time?
**THE 10 MOST DOWNLOADED PODCASTS FROM DR**

**Period:** 2016  
**Source:** Server data from DR

1. **Mads & Monopolet**  
2. **Orientering**  
3. **Hjørnekassen**  
4. **Videnskabens verden**  
5. **Selvsving**  
6. **P1 Documentaries**  
7. **P1 Debate**  
8. **Harddisken**  
9. **Eksistens**  
10. **P1 Morgen**

8,258,400  
1,743,800  
1,594,500  
729,500  
708,600  
649,100  
646,700  
625,400  
598,700  
469,080

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**THE 10 LARGEST RADIO CHANNELS IN DENMARK**

**Target group:** 12+ years  
**Source:** Kantar Gallup Radio-Meter

<table>
<thead>
<tr>
<th>Channel</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>P4</td>
<td>35,5%</td>
<td>35,9%</td>
</tr>
<tr>
<td>P3</td>
<td>18,6%</td>
<td></td>
</tr>
<tr>
<td>P1</td>
<td>15,7%</td>
<td>6,3%</td>
</tr>
<tr>
<td>P5</td>
<td>6,3%</td>
<td>6,8%</td>
</tr>
<tr>
<td>Nova</td>
<td>4,2%</td>
<td>4,8%</td>
</tr>
<tr>
<td>P2</td>
<td>3,8%</td>
<td>3,3%</td>
</tr>
<tr>
<td>Radio24syv</td>
<td>2,2%</td>
<td>2,7%</td>
</tr>
<tr>
<td>P7 Mix</td>
<td>3,7%</td>
<td>3,7%</td>
</tr>
<tr>
<td>Skala FM</td>
<td>0,6%</td>
<td>1,8%</td>
</tr>
<tr>
<td>Radio 100</td>
<td>0,9%</td>
<td>1,7%</td>
</tr>
</tbody>
</table>
HOW MANY DANES USE THE INTERNET ON THEIR MOBILES EVERY DAY?

Target group: 12+ years
Source: Kantar Gallup Index Danmark

2014: 51%
2015: 60%
2016: 64%
The mobile phone takes the lead

The development of digital media is progressing rapidly, and the mobile phone plays a key role. It wakes us up in the morning, accompanies us to work and entertains us during the evening. The mobile phone is used for social media, games and streaming, but it is also an important source of news, when the world is in flames.

By Sanna Høgenhaven Byrresen & Tina Skov Gretlund
DR Audience Research
The time Danes spend on the Internet, on smart phones and tablets as well as computers, continues to increase. PC usage still accounts for most of the digital consumption, but the use of smartphones in particular is growing significantly. 64% of Danes use the internet on their mobile phones. As such, it comes as no surprise that more Danes are using the internet from mobiles, as this has been the tendency over recent years. But what has changed to a great extent is the way in which mobiles are used in Denmark. By way of an example, the Danes’ use of TV and video streaming services on the small screen has more than doubled since 2015, and computer usage from a mobile platform is growing almost exponentially.

As in 2015, a number of Danish news media have more weekly mobile users than PC and tablet users. This applies, amongst others, to tv2.dk, berlingske.dk, bt.dk and mx.dk. Apart from the news, the Danes also use their mobiles for social media, games, entertainment and radio and music services.

MOBILES ENTERTAIN
Smartphone owners visit websites four times a day on average using their mobile phones, while they use apps five times a day. The younger target groups use apps more often than older people, who use websites more frequently than apps. One app in particular conquered Danish smart phones and public debate last year.

Pokemon Go got a million Danes out on the streets chasing Pikachu and his fellow species in record time. There are many reasons why so many Danes have tried their hand at Pokemon Go, but the main reason is because the game is a lot of fun and encourages motion and social contact.

Generally speaking, gaming is one of the activities on mobiles that Danes spend most time on. But while gaming activity has been reasonably stable over the past few years, streaming of both sound and video has increased on mobiles and other screens. Danes spend 44 minutes a day on average streaming TV content and films, which is an increase of 33% in comparison with 2015. Young people in particular are major users of streaming, not only of TV content and films but also radio and music streaming.

Social media also play a large part in the Danes’ - particularly women’s - increased use of the mobile phone. On average, women spend 48 minutes a day on social media, while men spend 37 minutes. Facebook has been women’s favourite app for several years and this is also true of 2016.

YOUNG PEOPLE ARE USING FACEBOOK LESS
The mobile phone and Facebook have gone hand in hand in recent years, and young people in particular have spent more time on Facebook than the rest of the population. For several years we have been able to read that Facebook is losing its younger users. There has not been any clear tendency in Denmark but the first signs that Facebook means less for the very young than previously were becoming visible in 2016.

In 2015, 73% of 12-19-year-olds used Facebook several times a day, as opposed to only 53% in 2016. This does not mean that the young have turned their back on Facebook, but they are not the high-frequency Facebook users they used to be. Snapchat, Instagram and YouTube are large competitors in the battle for young people’s attention. The young are more active on Snapchat, for example, while their behaviour on Facebook is more passive and observant.

This tendency is not observed amongst the 20-39-year-olds. Here there are more people who use Facebook on a daily basis and several times a day than in 2015, and there are also more users of Instagram and Snapchat. Hence there are clear indications that the Danes are adapting more to social media. It will be interesting to see, therefore, whether young adults also start to adapt teenagers’ social media habits, and also reduce the frequency of Facebook visits, or whether Facebook has become too big a part of the Internet infrastructure for this to happen.

THE MOBILE PHONE IS NOT JUST FRILLS
The young - and the Danes in particular - use their mobile phones a lot more for social media than for news, but the mobile phone is an important news source. If you asked the Danes which device they prefer for reading the news, the answer would be that they prefer their mobile phones to their tablets or PCs.

The mobile phone has contributed to a great extent in revolutionising the way in which Danes are informed of news. The small screen enables us to receive the news constantly, and it makes demands of news providers. The mobile phone was clearly a friend in times of need when terror struck in 2016 and the Danes needed news summaries and answers. Following the attack in Nice, the use of the mobile increased on several of the news sites, which are part of the Danish market research survey of traffic to the Internet media. This was also the case when the Danes wanted to be updated on the results of the American presidential elections.

The mobile phone is kept close at hand and has more and more different use cases: social media, news, games, entertainment, radio and music services, as well as TV and video streaming services. It is an increasingly important commodity and there is every indication that mobile phones will become all
WEEKLY USERS OF PCS AND MOBILES

JP/Politikens Hus have opted to be excluded from the Danish market research survey of traffic to Internet media. Websites such as eb.dk, politiken.dk and jyllands-posten.dk are therefore not included in the figures.

Target group: 7+ years
Source: Dansk Online Index

HOW MANY DANES USE SOCIAL MEDIA EVERY DAY

Target group: 12+ years
Source: Kantar Gallup Social Media Life

<table>
<thead>
<tr>
<th>Social Media</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>62%</td>
<td>64%</td>
</tr>
<tr>
<td>Snapchat</td>
<td>15%</td>
<td>19%</td>
</tr>
<tr>
<td>Instagram</td>
<td>11%</td>
<td>17%</td>
</tr>
<tr>
<td>Twitter</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Pinterest</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Reddit</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Tumblr</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>
the more important in the future, in terms of the way in which the mobile affects our social contact with others and, indeed, as a media platform as well.

**HOW MANY DANES USE THE INTERNET EVERY DAY?**

**Target group: 12+ years**

**Source:** Kantar Gallup Index Danmark, Average of 1H year period and 2nd + 3rd quarters

<table>
<thead>
<tr>
<th>Year</th>
<th>Via mobile</th>
<th>Via PC</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>29%</td>
<td>72%</td>
</tr>
<tr>
<td>2012</td>
<td>35%</td>
<td>72%</td>
</tr>
<tr>
<td>2013</td>
<td>44%</td>
<td>70%</td>
</tr>
<tr>
<td>2014</td>
<td>51%</td>
<td>65%</td>
</tr>
<tr>
<td>2015</td>
<td>60%</td>
<td>65%</td>
</tr>
<tr>
<td>2016</td>
<td>64%</td>
<td>55%</td>
</tr>
</tbody>
</table>
TOP 5:
WHAT WOULD YOU MISS THE MOST?

Period: 2016
Target group: 3-59 years
Source: Norstat for DR Audience Research

24% DR
14% Netflix
14% YouTube
13% TV 2
10% TV 3
Streaming services continue to gain ground

Streaming services led by Netflix and YouTube are gaining strength and are very popular among the very young. There are also experience differences between traditional flow TV and streaming services, and the latter have a strong entertainment value.
Streaming services have achieved a lot over the last five years as far as TV programmes are concerned, and not without good reason. At the end of 2016 Netflix and YouTube were in a particularly strong position and were pushing broadcasters as well as the boundaries for how TV content is delivered. DR Audience Research studied TV and streaming habits in Denmark in the spring of 2016, and this work clearly emphasises this fact. The Danish results come from a study carried out by DR in collaboration with NRK, SVT and YLE, in which over 7,000 people between 3 and 59 took part.

Of the Danish participants under 40 years of age, almost half would miss Netflix and YouTube the most, which puts these two services on the same level as the four major Danish broadcasters together (DR, TV 2, MTG and Discovery Networks), which provide both traditional flow TV and their own streaming services. Netflix would be missed the most, for which there is good reason. Users base their choice on the large selection of TV series, that are available with a lot of seasons and episodes. This also helps to emphasise the role played by fiction in the modern interpretation of TV.

Traditional TV and streaming services are used to the same extent by Danes under 40 years of age. The study shows that a good 60% of the participants had used traditional TV the day before, while the level of the streaming services was almost just as high. This is backed up by an estimate carried out by DR Audience Research in the spring of 2016, which showed that Netflix and YouTube would be the largest two “TV channels” in Denmark amongst the 15-29-year-olds, measured on the basis of time consumption.

TV SERIES ARE THE WINNERS

It is the same picture when respondents were asked what the Danes’ favourite content is across streaming services and traditional TV. Amongst all those questioned, fiction series featured most prominently, and amongst people under 40, almost 70% prefer series. As this 37-year-old male states:

“I am streaming an episode of Supergirl via HBO. Normally I would have chosen something more serious, but after a hard day at work, Supergirl is easy to digest. So the most important advantage to streaming is that it enables me to tailor my media usage, not just to my interests but also to my moods and energy.”

Male, 37 years

American series such as Game of Thrones, Narcos and Stranger Things feature in many of the responses, particularly amongst the youngest participants, and foreign fiction take the place of honour. This is due, first and foremost, to the streaming services provided by Netflix and HBO Nordic, and this was far from being the case to the same extent before streaming became mainstream. Apart from fiction, foreign content is also popular among Danes under 40, while Danes over 40 prefer Danish content as well as content from traditional broadcasters.
Hence the streaming services are also helping to pull viewing more in the direction of entertainment. Almost 80% of viewing on streaming services relates to relaxation and recreation, while traditional TV, dominated by DR and TV 2, has a profile in which entertainment features less.

Danish broadcasters also provide streaming and, as international streaming services, they provide content other than fiction. Therefore, there is also an increasing degree of competition in many other genres than fiction alone, in particular life style, documentaries and comedy. Consumption is beginning to blend together, and a future where streaming seriously competes in areas other than fiction is being drawn up. Sports, for example, could become the next major draw. Sports is currently offered by Viaplay, DPlay and TV 2 Play, for example live sport, as part of the streaming package, and among participants who prefer Viaplay, sports is one of the most important reasons.

DIFFERENCE IN EXPERIENCE

The study also shows that streaming services in general provide a better experience than traditional TV amongst their respective users. Streaming services receive a better overall assessment of the actual experience than traditional TV. At the same time, a greater proportion of those questioned appreciate the fact that the streaming services allow them to find more relevant content as well as content they can watch when it suits them.

“I am streaming ‘Follow the Money II’ on my mobile on the bus on the way to my studies. That’s smart, because I can take breaks on my way, when I get a text that I need to answer straightaway.”

Male, 23 years

Unlike streaming services, traditional TV is associated with something that runs in the background, and with uninteresting content.

This difference makes sound sense, as we are comparing a flow medium, which is intended for multiple users, with a selective optional medium, which is tailored to the individual user. But it is also one of the challenges facing classic TV channels, as the technology works in favour of the streaming services in many respects. Only a few years ago we would probably have viewed the difference from the opposite angle, because streaming at that time was found to be cumbersome, while, in comparison, traditional TV was considered to be easily accessible. Netflix in particular has turned this perception on its head, and traditional TV has been overtaken on a number of parameters.

The greatest challenge – in years to come as well as now – is to maintain relevance for the TV viewers, who are becoming increasingly spoilt and impatient. The streaming services are often there at the touch a button on the remote control, and provide content that you can watch further or tailor-made recommendations based on your own habits, if you want to find new content. The most essential thing for Danish content providers is to get their streaming services to appear attractive in terms of content, laytime and functionality.

THE DEVELOPMENT CONTINUES

When the Danes want to watch TV, whether flow TV or streaming services, the traditional TV set still dominates, while smart TV is the next most used medium for live images. As the Danes, quite naturally, replace their TV sets over the coming years, more and more
WHAT DID YOU USE YESTERDAY?

Period: 2016
Source: Norstat for DR Audience Research

- Traditional TV
- Streaming services with TV and films
- Short videos and clips on the net

![Graph showing the use of various media by age groups.](image-url)
of them will be given direct and easy access to streaming services in their living rooms. This will put pressure on traditional TV, which has historically dominated the TV sets, and, at the same time, it will open up the market for streaming further, in particular for the older target groups.

Technologically, there is every reason to believe that this development will continue. More and more remote controls are being produced with a Netflix button, and Google, which owns YouTube, is also found on the Android platform, which is widespread among many of the larger TV manufacturers. And new actors, such as Amazon Prime, have made their entrance onto the Danish consumer market. As this 24-year-old male points out, the demands are high – for Danish streaming services too:

“I sense that there is a lot of content that is not easy to find, unless you know what it is and actively look for it. So I think it would be great to have more and better sites, where you can explore and be inspired to watch something out of all this good content that can be found on Danish streaming services. A bit like Netflix.”

Male, 24 years

At the same time, another clear tendency can be seen. The participants in the study associate traditional TV, to a large extent, with a broad range of qualities, whilst the streaming services have a clear focus on entertainment, relaxation and ease – qualities that the broadcasters too have always stood by. As matters stand now, the streaming services stand by these qualities even more firmly than traditional TV, and this also explains why the commercial TV stations have been hit a lot harder by the streaming services than DR and, to an extent, TV 2 as well.

The question is whether traditional TV’s broad profile is sufficient to keep the Danes, young Danes in particular, on the broadcast platform on a broadly similar scale as today. For instance, the viewing of traditional TV has halved for children and young people since 2010. Traditional TV’s strengths are, specifically, news, sports, entertainment programmes and live shows, but these genres too can be transferred to streaming services and other platforms such as social media.

Hence if broadcasters are to maintain the broad relevance in the future, it will not be with the TV channels alone - particularly if contact with the younger part of the population is to be maintained. The question is, then, whether national public-service actors, such as DR and TV 2, are able to take up the battle with the well-oiled, global entertainment machines in the long run. There is scarcely any doubt that the risk of losing grip of the younger users is present, and if this battle is lost, a generation of future public-service users is likely to be lost as well.
DEVICES AND APPLIANCES THAT ARE REGULARLY USED FOR TV CONTENT AND FILMS

Period 2016
Target group: 15-59 years
Source: Norstat for DR Audience Research

Regular TV
Smart TV
PC
Smartphone
Tablet
Google Chromecast
Apple TV
Games console
HOW MUCH SPORT IS BROADCAST ON DANISH TV?

The graph shows the number of broadcast hours on the 30 largest TV channels in Denmark. The Eurosport channels are not included, as they have not kept any programme logs for 2015.

Source: Kantar Gallup TV-Meter
Viewers are being overfed on sport

There has never been as much sport on TV as in 2016. But although consumption has risen over recent years, it is still a long way behind the number of broadcasting hours, which has more than doubled since 2012. Sport still has the capacity to attract large numbers, but there must be a limit to how much more sports viewing can be squeezed out of the Danes.

By Dennis Christensen, Jakob Vikær Hansen & Uffe Høj Svenningsen
DR Audience Research
2016 was a record year with the UEFA Euro 2016 football finals and the Olympic Games in Rio as the absolute highlights. A haul of medals for Denmark and success for the Danish national handball team were extremely instrumental in ensuring that four out of five Danes followed the Olympics in live images, and that over two million Danes watched the national handball team's finals on TV. Despite the lack of Danish participants, the UEFA Euro 2016 finals enjoyed equally good ratings for five matches, amounting to a million viewers.

This emphasised the fact that sport continues to have a rare ability to attract large numbers of viewers from all over Denmark, regardless of gender and regions. Every TV viewer spent an average of 102 hours watching everything from the Olympics and the Tour de France to Formula 1 and the Superliga football in 2015, and this ranks among the highest levels ever. But in spite of the healthy interest in sport, the great sporting summer also presented a range of challenges for the sports genre on TV.

**DANES WATCHED EURO 2016 AND THE OLYMPICS LESS**

Sport was broadcast on more channels in 2016 than usual, while several hours from each sports event were broadcast at the same time. This meant that the range was both broader and more profound. The TV consumption of sport rose precisely as a result of a general decline in traditional TV watching, time differences, lack of Danish participation and an improved streaming offers, but the development is, nonetheless, paradoxical in a market that has never before experienced so much sport on TV. Why do major events such as the UEFA Euro 2016 and the Olympics fail to raise time consumption on a par with the increase in broadcasting hours?

**EASIER TO OPT OUT OF SPORT**

Increasing the volume of sport on TV makes it, in theory, more accessible to viewers. But viewers who are less interested in sports are lost because they have better options for live TV today than before, which enable them to deselect sports actively – instead of being a passive spectator, which seems to have been the case previously.

The fact that the time consumption for the UEFA Euro 2016 and the Olympics has fallen as the number of broadcasting hours has risen cannot be put down to a lower level of interest among the viewers present. It has been caused to a greater extent by the existence of a category of viewers who have not enjoyed sufficient options previously, when air time has been devoted to sport. But the streaming services offer an alternative, and when you stream Netflix, for example, you don’t suddenly come across a fascinating Olympics discipline on traditional TV, which you would not have been planning to watch otherwise.

**STREAMING DOES NOT COMPENSATE FOR FLOW**

At the same time, the target group for niche sports and sports without Danish participation, which make up a large part of the additional broadcasting hours, tailors their own unique sporting experiences across TV, streaming, apps and the internet. As far as UEFA Euro 2016 and the Olympic Games, are concerned, DR Audience Research’s studies show that by no means all viewers that have turned away from TV are turning towards streaming. In spite of an increased consumption of streaming during UEFA Euro 2016 and the Olympics, there are fewer people who are in touch with the major events via live transmissions on TV and streaming services. This challenges the status viewing numbers, and there is not much to indicate that this is happening to a sufficient extent at the present moment. If the use of streaming does not compensate for the decline in traditional TV – and a lot of people prefer just to watch the highlights on a third-party platform – the sports rights may lose their value. The development, therefore, challenges the way in which commercial actors earn money on their sports rights. Live transmissions and streaming, as well as short highlights on the internet, must be lucrative to enable the decline in traditional TV to be compensated financially too.
DEVELOPMENT OF BROADCASTING HOURS AND TIME CONSUMPTION OF SPORT ON DANISH TV CHANNELS

The graph shows the development of broadcasting hours and time consumption of sport on the 30 largest TV channels in Denmark. The Eurosport channels are not included as they have not kept programme logs prior to 2015.

Target group: 3+ years
Source: Kantar Gallup TV-Meter
THE FUTURE OF SPORTS IN LIVE IMAGES

Sport has always had and continues to have a magnetic attraction for the Danish population at large, and major events and Danish successes can still gather Danes from all sectors in front of their tablets, TV and on the Copenhagen Town Hall Square. Three out of four Danes state that they have an interest in sport in live images to some degree or other. But sport in live images is also facing a number of challenges with dwindling numbers of viewers, a fragmented use and a complex digital behaviour, in which it is important to know how to navigate.

Five types of sports viewers

In connection with the great sporting year of 2016, DR Audience Research has carried out a breakdown of the Danes, based on their interest in and consumption of sports in the media. The breakdown reveals, among other things, great differences in their interests for particular kinds of sports and the necessity for Danish participation.

Do not watch sport – 24%

A good quarter of the Danes do not watch sport at all. This segment is over-represented by women, who do not listen to, watch or read about sports in the media - and do not wish to either. During the Olympics, however, this segment may follow the headlines on TV if Denmark is winning any medals.

Events watchers – 28%

The largest segment also has a preponderance of women, who follow the main events on TV, including the Olympics and the national handball finals. These are social viewers, for whom Danish participation is important - even essential - for them to retain their interest. They often watch sport together with others and especially on other people’s initiative. They follow the Danish national football team for the sake of socialising, but decline to watch other football clubs, for example.

Slightly interested – 20%

Every fifth Dane is slightly interested in sport. This segment includes both men and women, who follow sports now and again, preferably when Danes are in action. Handball, football and motor sports hold their interest and these are watched on both TV and streaming. National teams and leagues beat club teams and the Champions League. If it were up to the slightly interested, there might be less sport in the media.

Specialists – 7%

Young, active men who watch sports selectively constitute a small but hardened sports troupe. They follow sports in a variety of ways, including social media, streaming, apps and the radio. They follow football, handball and cycling, and also tennis, motor sports and badminton - typically sports categories they practice themselves. Danish participation is certainly important but the Superliga or the national team takes second place to club teams or the Champions League. As far as the specialists are concerned, they would like to see more sport in the media.

Sports nerds – 20%

At the heavy end of the spectrum are sports nerds, who are typically mature men, who digest all types of sport on all platforms. There are regular viewers of lesser sports types such as ice hockey, ski sports and swimming in this section, which of course also includes handball, football and cycling. Sports nerds do not need Danish participation for them to be able to become engaged in sports, and they are happy to watch it by themselves. Sports nerds tend to be active themselves, and journalistic professionalism is important for them as far as TV sports are concerned.
HOW MANY DANES FOLLOW THE NEWS EVERY DAY OR ALMOST EVERY DAY?

Period: 2016
Target group: 15+ years
Source: Megafon for DR Audience Research

95%
Quick news fixes are making us dizzy

The Danes are news junkies, and many are even unable to wait for a bus, stand in a supermarket queue or go to the toilet without having a fix. The news is most often delivered with a lightly flickering image, which makes a lot of people dizzy and creates a need for background and perspective.

By Henrik Gregor Knudsen & Lene Heiselberg
DR Audience Research
The Danes watch the news to an enormous extent. While the printed newspapers’ readership figures are on the decline, and the consumption of news on the radio and TV is relatively stable, Internet news consumption continues to rise. Three out of five Danes currently receive their news on smartphones, tablets or PCs at least every day, and by far most of them do so several times a day. Overall, the Danes have hardly ever had as much news as they have today.

Unlike the radio, which is listened to the most during the daytime, and TV, which is mainly watched during the evening, the consumption of online news – in particular on smartphones – has no prime time. Whereas the news used to be broadcast at clearly defined time scales, for example, in the car on the way to work or as an accompaniment to afternoon coffee, the news is nowadays something most of us receive in a steady stream, from when we get up to when we go to bed. This ubiquitous and flow of consumption of the news has been studied by DR Audience Research with the assistance of 26 Danes, who have documented their consumption of the news in words, images and videos by using an app on their smartphone.

The study shows that the news has crept into practically all the cracks of our existence; as something we come across accidentally but also as something we actively seek. By way of an example, a woman in her menopause was reading the news on her mobile when she was overcome with hot flushes during the night, while one young man routinely checked three or four news sites at different times of the working day. The news is also used to fill out the short breaks throughout the day; an impatient father used the minutes leading up to the conversation on the way home from school to read the news, while a travelling salesman used a queue on the motorway to skim through a printed newspaper. A young woman went through all the news in her Facebook feed while she was waiting for a bus.

**A LOT OF QUICK FIXES**

In visiting the various online news sources, consumers are in search of a quick fix. They describe their behaviour as erratic, superficial and fleeting, emphasising the fact that they only manage to read the headlines and look at the pictures. The round trip to the different news sources is most often made in the same sequence, and the length of the session is very short; it often took several participants in the study only 20-30 seconds. Participants normally stop their trip when they reach the place they reached when they last visited the news source in question.

Moreover, the quick news updates are characterised by their high frequency. Consumers typically take a news trip when they are on a break or in need of distraction. Although the news is used to pass the time or for procrastination, this is not at all perceived as a sin. News users feel that they are using their breaks and breathing spaces in a sensible way, while orienting themselves through the news flow, which gives them an obvious satisfaction, which can be compared to the kick gamers get when they find a new direction in a game.

However, news consumers also point out the disadvantages to their repeated and erratic news fixes. Some have the sensation of finding themselves in the middle of a whirlwind of news, in which they may easily become disoriented. For example, one 37-year-old man states that, as a rule, he only reads the headlines, which, combined with the vast amount of news he is exposed to, has the effect that he finds it hard to work out how matters actually relate to each other.
HOW MANY DANES FOLLOW THE NEWS EVERY DAY OR ALMOST EVERY DAY BY USING THE FOLLOWING MEDIA?

Period: 2016
Source: Megafon for DR Audience Research

<table>
<thead>
<tr>
<th>Media Type</th>
<th>15+ years</th>
<th>16-29 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>36%</td>
<td>67%</td>
</tr>
<tr>
<td>News sites and apps</td>
<td>60%</td>
<td>59%</td>
</tr>
<tr>
<td>Radio</td>
<td>30%</td>
<td>53%</td>
</tr>
<tr>
<td>Sociale medier</td>
<td>52%</td>
<td>73%</td>
</tr>
<tr>
<td>Aviser</td>
<td>16%</td>
<td>35%</td>
</tr>
<tr>
<td>Tekst-tv</td>
<td>16%</td>
<td>2%</td>
</tr>
</tbody>
</table>

WHICH MEDIA ARE PREFERRED FOR NEWS AND BACKGROUND?

Period: 2016
Source: Kantar Gallup Social Media Life

<table>
<thead>
<tr>
<th>Media Type</th>
<th>12+ years</th>
<th>12-29 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>77%</td>
<td>62%</td>
</tr>
<tr>
<td>Radio</td>
<td>33%</td>
<td>46%</td>
</tr>
<tr>
<td>Net</td>
<td>33%</td>
<td>47%</td>
</tr>
<tr>
<td>Facebook</td>
<td>31%</td>
<td>56%</td>
</tr>
<tr>
<td>National newspapers</td>
<td>11%</td>
<td>21%</td>
</tr>
</tbody>
</table>
He is not alone in this. Several news users point out that they do not reach a level where they understand what the news is about, since it is overview and not comprehension that takes priority. The consumers refer to what they get out of the quick news fixes as news impressions, which hits the fleeting nature of the behaviour right on the spot. After all, it is not the aim of this sort of news consumption to create a deeper understanding.

STILL A NEED FOR BACKGROUND
The erratic use of digital news should be seen as a contrast to the use of the news that is characterised by deeper understanding, analysis and perspective. The two types of news consumption exist side by side and the erratic use of digital news does not remove the need for deeper understanding. The respondents in the study talk about this type of news product in a way that can be compared to lighthouses which enable them to navigate in a stormy sea of all manner of headlines. These lighthouses help them to sort out the many news impressions, so that only the most essential are left.

The fact that the erratic use of the news is not in direct competition with the more classical news consumption is demonstrated by the remarkably strong continued status of the omnibus transmissions on DR1 and TV 2, despite a general decline in traditional TV, as well as the success experienced by newspapers such as Kristeligt Dagblad and Weekendavisen, based on reader numbers. The erratic consumption of digital news presents challenges, however, to the media and has also led to a decrease in both TV news and newspapers in recent years.

THE NEWS IN SEVERAL TEMPOS
Consumers have clear motives for seeking specific news media in specific situations, so it is important for the media to be in sync with their consumers, in order to meet their expectations. For instance, an online medium that chiefly provides long reads or live TV coverage of main events will probably have a limited consumer potential, as many users simply skim over the headlines and often do so when they are in the middle of doing something else. Conversely, a late-night news transmission on the TV, which simply repeats the bombardment of news impressions that users have already received during the course of the day, will fail to satisfy many viewers’ motives for watching.

The fleeting consumption of news makes the same high demands of those media that want their users to immerse themselves in analyses and content that puts things into perspective. This type of news consumption means that users are familiar with a wide range of headlines but seldom get to grips with the facts and context. Therefore, a medium that predominantly wishes to put the news stream into perspective will risk talking over the heads of its users unless this putting into perspective also involves giving an account of the story’s fundamental circumstances and context.

From a business point of view, it can be difficult to earn money on quick news updates, which are so similar as to lead to confusion, regardless of who the sender is. Conversely, it may be possible to create a willingness to pay for this type of news journalism, which provides comprehension, analysis and perspective, although it has so far proved to be difficult to get enough people to pay for this to become a profitable business. It is also within this type of news provision that new media companies such as Zetland, Føljeton and POB are attempting to make themselves known.

About the study
DR Audience Research has studied 26 Danes’ news consumption across media and platforms over four week days in 2016. The participants have documented their news consumption by using an app on their smartphone, which has enabled them to share screen dumps, images, videos, sound and text on a regular basis. The participants are 25–60 years of age and use the news across several platforms. The participants are recruited by Epinion, while DR Audience Research has carried out the study.
HOW MUCH TIME DO YOUNG PEOPLE SPEND LISTENING TO THE RADIO DURING THE DAY?

Period: 2016
Target group: 15-29 years
Source: Kantar Gallup Radio-Meter

1h 18 min
The radio is still popular among young people

The battle for the young media consumers is hard. It is teeming with apps and digital services, but, in spite of this, young people still spend 1 hour and 18 minutes listening to the radio. This is because radio has three distinct qualities that make the medium relevant for the young.
The smartphone is immensely important for young people. They are always on and young people constantly relate to their surroundings through their mobile phones. In the same way, they also relate to their choice of content at all times, for example, news and entertainment via websites and apps or music, videos and series on streaming services.

Traditional radio does not meet young users’ desire for personalisation, social interaction and instant pay-off. So how can it be that, in spite of its rather old-fashioned nature, the radio still enjoys popularity amongst the young? DR Audience Research has carried out a quantitative and qualitative study, which indicates that the radio has three distinct qualities that keep radio relevant for young people.

**RADIO AS TIME-OUT**

Radio’s first and most important distinctive feature is its function as a background medium. Once you have chosen which channel you want to listen to, traditional radio relieves the user, to a large extent, of the responsibility of making any further choices. As a radio listener, you do not need to make any input into radio-listening, but can mentally zap in and out of an ordered flow, while doing other things. One young woman puts it as follows:

“There is actually a very liberating aspect to the radio: I just switch it on, and I don’t need to worry about anything else. The hosts talk about what they want to and what they think I ought to know, and they also choose the music for me.”

Female, 21 år

The woman is just one of many examples from the study, confirming that the young accept that others have decided what they should listen to and be concerned with as long as the radio is on - provided that they are actively listening and not simply using the sounds to create an atmosphere or musical backdrop. The study indicates that this motivation for listening to the radio is becoming increasingly important.

**RADIO AS COMPANY**

But the radio is more than a background sound. The radio provides company and inspiration, allowing you to discover new tendencies, which break from the digital communities’ at times self-confirming information flow. The young are invited to an informal community, where their “friends” on the radio can discuss everything from crab lice to negotiations on financial legislation – without the young persons necessarily having to express their own thoughts, views and opinions. One young woman describes her views on the radio hosts in the following manner:

“Good company with the hosts is probably what characterises the radio. Besides the music, you become part of a company you feel involved with, even though communication is of course only one-way.”

Female, 22 år

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**THE 10 LARGEST RADIO CHANNELS IN DENMARK**

<table>
<thead>
<tr>
<th>Channel</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>P3</td>
<td>31.8%</td>
</tr>
<tr>
<td>P4</td>
<td>16.9%</td>
</tr>
<tr>
<td>Nova</td>
<td>9.4%</td>
</tr>
<tr>
<td>P7 Mix</td>
<td>4.1%</td>
</tr>
<tr>
<td>The Voice</td>
<td>4.0%</td>
</tr>
<tr>
<td>Skala FM</td>
<td>3.1%</td>
</tr>
<tr>
<td>Radio 100</td>
<td>2.5%</td>
</tr>
<tr>
<td>Pop FM</td>
<td>2.4%</td>
</tr>
<tr>
<td>Radio24syv</td>
<td>2.1%</td>
</tr>
<tr>
<td>Radio VLR</td>
<td>1.9%</td>
</tr>
</tbody>
</table>

Period 2016
Target group: 15-39 years
Source: Kantar Gallup Radio-Meter
This right company at the right time on the radio is more important than ever before. At the same time, the wrong host at the wrong time results in the radio being deselected more quickly than we have seen before. If the precise mix of content, music and atmosphere we want for our morning coffee, daily jog or cooking session can be specified on other media, it is all the more important for the radio host to be capable of satisfying his listeners’ wishes for specific moods at specific times.

**RADIO AS CURATED CONTENT**

Young people in the study consider it a quality that the radio’s content is selected from parameters other than on, for example, Facebook and Spotify. Whereas the curation of these services is based on the user’s activity combined with algorithms, the radio’s content is based on the channel’s profile, flow, mood and a human element, which does not have such a precise impact, perhaps, as an algorithm, but which gives significantly more surprises. This curating has its strength in offering the listeners what they want, but also what they didn’t know they were missing.

“As one young man puts it:

“I usually listen to my playlists on Spotify in the morning, but I’ve been listening a lot more to ‘Good Morning P3’ today. That’s where the more quirky and funny news is, which I don’t normally listen to.”

Male, 18 years

The challenge for the different types of media in the future is, therefore, to exploit and expand on their distinctive features, instead of trying to copy other media’s distinctive features. For instance, radio should not attempt to copy the streaming services’ digital curation of music, but should focus instead on the strengths the medium itself brings to its listeners - and which the media user expects of the radio.

**VIDEO DID NOT KILL THE RADIO**

The radio has, and has always had, certain distinctive features which young people have selected on demand. Over the past ten years new media platforms have been battling with the radio for young people’s attention to many of these distinctive features. In content areas such as music, news and humour, the radio has increasingly come under pressure from new media, while the radio’s unique features in other areas stand out all the more clearly and are becoming all the more conspicuous in the media context.

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In the future, the radio and content on other platforms will continue to offer young persons different content for different situations in perfect co-existence - and in this respect, history repeats itself. As television spread in the 1960s, the radio was forced into a new role as a background medium, and the radio medium has succeeded in redefining itself.

In the same way, we can see that the radio is again being challenged by social media and music streaming, but also that the traditional flow-radio is once again in the process of finding its own particular role.

**About the study**

DR Audience Research carried out an analysis in the spring of 2016 of how and why young people use music and sound content on different media. On the basis of a questionnaire survey with 612 respondents consisting of 15-39-year-old radio listeners and an older control group, we carried out a mobile ethnographic study, in which we asked 30 young persons to document their media behaviour and media selection during the course of one week by using an app on their smartphone, which enabled them to share text, images, videos and sound.
How many channels are watched by a TV viewer on average per day?

Target group: 3+ years
Source: Kantar Gallup Radio-Meter

9
2016

14
2010
The remote controls are getting dusty

The Danes change channels less and less. Between 2010 and 2016 the average number of channel visits fell by 36%, and the younger viewers in particular reach for the remote control with less frequency. But why are the Danes changing channels less? DR Audience Research has investigated seven possible reasons.
1. IS IT BECAUSE PEOPLE ARE WATCHING LESS TV?
The daily consumption of traditional TV has fallen by a good quarter since 2010 - mainly because a lot of people no longer turn on their television set on a daily basis. It would be logical to believe that this alone would explain the fall in the number of channel visits. But the number of channel visits is only calculated on the basis of the number of people who turn on their TV during the course of the day, and amongst these viewers the number of channel visits has fallen by 36%. At the same time, the viewers spend more time on each channel, which on average lasted 27 minutes in 2016 - 9 minutes longer than in 2010. TV consumption for viewers turning on their sets during the course of the day fell by a mere 4% during this period, which only explains a small part of the decline in the number of channel visits.

ANSWER: Partly. It explains that there is a fall in the number of channel visits per day, but it does not explain why there is more time between each channel change.

2. IS IT BECAUSE VIEWERS HAVE FEWER CHANNELS?
In 2010, 65% of all Danish households had access to more than 20 different channels on their TV. In 2016 the number dropped to 54%, and the proportion of households that have no access at all to a traditional TV signal has risen from 3% to 10%. With fewer channels, it also takes less time, of course, to take a "round trip" through all the channels, but the number of channel visits is falling both for those with access to few channels and those with many channels, just as the duration of the channel visit is increasing irrespective of the number of accessible channels. Hence the number of channels is of no significance for the development.

ANSWER: No, not directly. I.e. the channel switching behaviour is changing regardless of the programme lengths.

3. IS IT BECAUSE THE BROADCASTERS HAVE BECOME BETTER AT SCHEDULING?
We know that the TV stations constantly go to great pains to retain their viewers. Some have tried altering the programme length, and others have changed the structuring of breaks and advertisements. To examine whether this has any effect on channel changing, it would be useful to take a look at DR1 and TV 2, 19:00-22:00 in 2010 and 2016. Here we can see that DR1’s programmes have become a little longer on average, while the duration of programmes on TV 2 has not been changed. This means that there are fewer opportunities to change channels for viewers of DR1 than for viewers of TV 2, which has remained unchanged. It is clear, however, that the duration of the channel visits is still the same on both channels. This indicates, therefore, that the changes in the Danes’ channel switching behaviour have nothing to do with scheduling and optimisation of air time.

ANSWER: No, not directly. I.e. the channel switching behaviour is changing regardless of the programme lengths.

4. IS IT BECAUSE WATCHING TV HAS BECOME MORE SOCIAL?
38% of young people watched TV in the company of others in 2010, while the figure for 2016 is half this number. Changing channels may require discussion in the lounge, and it takes an average of 5 minutes longer to change channels if there are several people in front of the screen. But whereas the young are watching TV in the company of other people to a greater extent, the opposite development can be observed amongst the older viewers, where watching TV has become a little less social. Overall, it balances itself out and so we cannot say that TV watching has become more social on average. At the same time, we can see that there is
DEVELOPMENT IN THE DANES’ CHANNEL SWITCHING BEHAVIOUR

Target group: 3+ years
Source: Kantar Gallup TV-Meter

Channel visits per day per TV viewer

Duration per channel visit
How much do Danes flick through the channels when watching TV with other people?

The number of channel visits per day in relation to the number of persons in front of the screen.

Period: 2016
Target group: 3+ years
Source: Kantar Gallup TV-Meter

- 8 channel visits: One person in front of the TV
- 5 channel visits: Two persons in front of the TV
- 3 channel visits: More than two persons in front of the TV
more time between each channel change regardless of the number of people in front of the screen.

**ANSWER**: No, watching TV has not become more social and, moreover, the increased duration of the channel visits is apparent for those who watch TV by themselves as well as for those who watch in the company of others.

5. **IS IT BECAUSE OF BETTER ACCESS TO RECOMMENDATIONS AND TV-GUIDES?**

TV-guides on text TV, in newspapers and weekly magazines have been helping viewers to find their way around the channel landscape for many years, and only a few more have been added over time - i.e. home pages, apps and EPG. It is the short channel visits of under 6 minutes that have become fewer in number. It is not inconceivable, therefore, that the explanation lies in the fact that people now have better opportunities for choosing the right programme from the start. Compared with 2010, there are fewer people in 2016 who reply that they usually find out what is being shown on TV from text TV or published TV-guides, while clearly more are using EPG. At the same time, there are more people replying “other”, which may be an indication of increased usage of apps or recommendations from social media. The largest increase over the past couple of years, however, is among those who answered that they just turn on the TV and see what is on, who in 2016 made up a quarter of those with a TV. Overall, the spread of TV-guides on digital devices is not the determining factor for the decrease in channel changing, but the increased use of EPG may well explain the decline in part, in that it is a very convenient alternative to flicking through the channels as it can be linked to the remote control.

**ANSWER**: Partly. It is not a crucial factor, as more and more people simply turn on the TV to see what is on. But the spread of EPG may mean that some viewers are in a better position to select channels.

6. **IS IT BECAUSE PEOPLE’S HANDS ARE FULL OF OTHER THINGS THAN THE REMOTE CONTROL?**

There are more people who remain tuned into the channel during commercial breaks. If we take, by way of example, four episodes of Luk-susfaalden on TV3 in October 2010, 64% of the viewers stayed tuned to that channel, while in October 2015 the figure was 78%. This could be because commercials have become more watchable, or there may be other reasons too why channels are not being switched to the same extent during the breaks. For instance, two out of five people in 2016 stated that they often use their mobile or tablet while watching TV, and the spread of smartphones has increased from 38% in 2011 to 85% in 2016. Moreover, the development in the channel-switching behaviour is most apparent among the often mobile-dependent 15–24-year-olds, where the number of channel visits has fallen by 63%, against 36% among the population as a whole. There are indications that the TV medium is becoming increasingly pushed into the background and the mobile phone brought into the foreground, and therefore the remote control is allowed to spend longer by itself.

**ANSWER**: Yes, amongst other things. There are indications that viewers are increasingly reaching for their mobiles, whereas they previously changed channels.

7. **IS IT BECAUSE THERE ARE NOW ALTERNATIVES TO FLICKING THROUGH THE CHANNELS?**

One of the reasons why the consumption of traditional TV, with scheduled flow channels and the associated channel-switching behaviour, has fallen is because new methods of viewing TV content have appeared. In 2015 a study showed that one of the most popular reasons for streaming TV content is because there is nothing of any interest on the regular TV channels. Before viewers switch off their TV, we can see that there are around a third fewer channel visits in 2016 than in 2010. This points to the fact that, when viewers are unable to find anything interesting to watch, they have been quicker at abandoning the search entirely. It is not inconceivable, however, that the search will continue on a streaming service.

**ANSWER**: Yes, there are indications that, when TV is not interesting enough, the viewer has been quicker at switching from traditional TV to a streaming service or other digital entertainment.

**WHY ARE DANES CHANGING CHANNELS LESS?**

From an overall perspective, changes can be observed in Danish TV households. The Danes change channel less and spend more time on the same channel, while they have cut back on very short channel visits and have become quicker at turning off their TV when there is nothing interesting to watch. A picture emerges of two reasons for the changes in particular: the mobile phone and streaming.

Hence, TV’s position as the primary medium is being challenged, and TV no longer has the monopoly on the viewers’ attention when they sit in front of the screen. When there is nothing interesting to watch, the mobile phone is closer to hand than the remote control, and switching on Netflix is just as easy as changing channels. The new media have basically provided greater opportunities to switch channels.
HOW MANY DANISH FACEBOOK USERS HAVE MADE A LIVE VIDEO IN RECENT MONTHS?

Period: 2016
Target group: Weekly Facebook users
Source: Kantar Gallup Social Media Life

2%
Live from the web

In 2016 Facebook introduced live video, and anyone with a smartphone can now broadcast live from the internet. But live videos are at risk of becoming boring and contradicts with the way in which we normally use the internet. DR Audience Research has investigated what it requires to be successful with live videos on the internet.
The use of live video on the internet in Denmark has hitherto been modest. Services such as YouTube, Meerkat and Periscope have not been able to change this, but perhaps Facebook with its large number of users can help spread the phenomenon in the future. Despite the 3.6 million weekly Facebook users in Denmark, only 2% of them have made a live video on Facebook in recent months. Thus, it remains only a relatively small phenomenon in the country, and there may be several reasons why live video has not yet gained momentum on the internet.

**IT IS BORING AND CONTRADICTORY TO THE INTERNET**

There are typically long passages where nothing much really happens until the very end. In a live video from BuzzFeed, for example, 45 minutes and 686 rubber bands were used to make a watermelon explode. A rather dull piece of drama with a climax that is all over within a few seconds. In the case of the BuzzFeed video, it was not until the end that users started to become seriously absorbed, and if the over 10 million Facebook views were recalculated in terms of TV ratings, this would be equivalent to approx. 30,000, which is on a par with a niche cultural programme on DR K.

Moreover, the live video contradicts the way in which we normally use the internet. Videos on the internet usually perform the best if the content is snack-size, available anytime, as well as edited to an extreme, cut and angled. This is in stark contrast to long, unedited live videos. It may be difficult to see the user need in an hour’s live streaming from an event, when the highlights and an editorial selection can give you everything within a few minutes. On dr.dk articles with edited and angled videos always perform better than live streaming from the same event.

**THREE WAYS TO SUCCESS**

If live video on the internet is to be successful, the content needs, first and foremost, to be centred around a larger event. This event should be organised beforehand, i.e. you need an idea of the manuscript and story line in advance, as well as what will happen in the narration of the story. Coverage of an election night or a royal wedding on traditional TV, for example, would suffer terribly from a lack of manuscript and preparation, if the cameras were simply just left to run.

Next, there should ideally be something at stake. For example, whether Felix Baumgartner survives his jump from a height of 39 kilometres. There are differences between whether a parachute diver or a watermelon survives, and hence a live event is important in real time. The content’s quality is improved if it is seen “now”. Felix Baumgartner’s jump is not as interesting in an edited and cut version after the event.

Finally, exclusivity is an advantage, that is, if no one else transmits from the event. Exclusivity can also help to strengthen small but dedicated interest communities. And the low costs involved in transmitting live over the internet can be an advantage. For example, a few dedicated Rocket League players have the opportunity to watch a semi-final live on Facebook, which otherwise would never have been transmitted on a traditional TV channel.

**LIVE WITH A PURPOSE**

Live video is, of course, different from and more than a watermelon and a daredevil. Ordinary people can now transmit live from spontaneous and possibly dramatic events. An American woman, for example, transmitted live on Facebook seconds after her beloved was shot by an officer in the USA. Although the video was seen live only to a limited extent, it subsequently attracted masses of viewers when the major news media used excerpts from the video. In this case, it is not the live video but the edited version that ends up getting the most viewers. So it is not the live element but the nature of the content that makes the American woman’s video interesting - it could just as well have been taken on a mobile phone and subsequently uploaded onto, for example, YouTube.

In all probability, the use of live video will increase in the future. But it is crucial not to make live videos just for the sake of it. The quality and formatting must be improved for live video to achieve success and make a breakthrough amongst the wider public. If the story does not gain anything from being told live, then perhaps it’s better to stick to a more traditional video format. Without prior organisation or preparation of the manuscript or story line, the content will appear in stark contrast to a professional TV production. And before that happens, we have to settle for live videos that either add value to small but strong communities or not good enough for TV.
HOW MUCH TIME DO CHILDREN SPEND IN FRONT OF SCREENS EVERY DAY?

Period: 2016
Source: Norstat for DR Audience Research

1h 37 min
3-6 years

3h 10 min
7-12 years
Children are using screens in new ways

Children’s media habits have changed noticeably in recent years, where time spent watching traditional TV has fallen, while digital media usage has grown. The time available to children to spend in front screens is unlimited, and for this reason the competition for their attention is de facto a zero sum game, where American giants challenge traditional TV providers and Danish-produced content.

By Lene Heiselberg & Tina Skov Gretlund
DR Audience Research
In 2016 DR Audience Research carried out a repeat study of children’s media habits from 2014. The study shows that children’s screen time, that is the total time children spend on various devices, is for the most part unaltered. 3-6-year-olds spend 1 hour and 37 minutes a day in front of the screen, while 7-12-year-olds spend a little over 3 hours a day. The fact that children did not use more time in 2016 suggests that the various platforms, devices and content providers are contesting for the same pool of minutes. Hence, in 2016 we are de facto dealing with a zero sum game, as few of the children themselves are deciding how much time they should spend on media content.

SCREENS ARE CHANGING THEIR FUNCTION
For the 3-6-year-olds the consumption of traditional TV has fallen considerably since 2014, and at the same time 95% of the 3-6-year-olds now have access to a tablet at home. Half of the 3-6-year-olds are extremely reluctant to go without their tablet. It is tempting, therefore, to believe that children have lost their interest in the big TV screen, but this is far from the truth. They are using it not only to watch traditional TV but also, to a large extent, for streaming TV and video content.

There has also been a substantial change in the way in which the 3-6-year-olds use their tablets. In 2014 the tablet was used predominantly for games, but in 2016 YouTube in particular became a big hit, and the 3-6-year-olds are now spending more than 2.5 times as much time watching video content on their tablets as in 2014. Thus the change in the way in which tablets are used is another example of a change in the pattern of consumption, where many types of entertainment are offered in parallel.

THE COMPETITION IS GLOBAL
The declining time consumption of traditional TV among the 3-6-year-olds is due in part to competition from other platforms and in part to competition between content providers. Netflix has a strong presence on the TV screen, and on average the 3-6-year-olds spend twice as much time on streaming services as in 2014.

In the battle for children's daily screen time YouTube and Netflix are now competing with TV channels such as Cartoon Network, the Disney channels and DR Ramasjang. DR Ramasjang is still the most widespread across different devices, with half of the 3-6-year-olds using the channel every day or almost every day.

YouTube and Netflix, both of which are watched by almost a third of the 3-6-year-olds on a daily basis, have grown since 2014. By contrast, the traditional TV channels, DR Ramasjang and Disney are experiencing a decline. The 3-6-year-olds and their parents are choosing content from the American streaming services with increasing frequency, which presents a challenge to the Danish-produced content and traditional TV providers.

If we take a closer look at children’s favourite apps, the same tendency can be seen. Here too the American content providers stand out as the strongest alternatives, and the competition for children’s attention is huge. The favourite apps of the 3-6-year-olds are DR Ramasjang, YouTube, Lego apps and Netflix.

YOUTUBE IS A GROWING GIANT
In 2016 YouTube provided entertainment for 31% of the 3-6-year-olds every day or almost every day, which is almost a two-fold increase on 2014. Among the 7-12-year-olds, just as among the 3-6-year-olds, there is one content provider in particular, and this is YouTube. YouTube owes its growth to the fact that it has become a digital Swiss army knife for the 3-6-year-olds, which was not the case in 2014. YouTube offers anything,
3-6-YEAR-OLDS WHO DAILY USE

Turner channels as well as Nickelodeon and Nick Jr. were not part of the study in 2014.

Target group: 3-6 years
Source: Norstat for DR Audience Research

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<thead>
<tr>
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<th>2014</th>
<th>2016</th>
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<tbody>
<tr>
<td>DR Ramasjang</td>
<td>49%</td>
<td>80%</td>
</tr>
<tr>
<td>YouTube</td>
<td>17%</td>
<td>31%</td>
</tr>
<tr>
<td>Netflix</td>
<td>17%</td>
<td>27%</td>
</tr>
<tr>
<td>Disney</td>
<td>19%</td>
<td>33%</td>
</tr>
</tbody>
</table>

7-12-YEAR-OLDS WHO DAILY USE

Target group: 7-12 years
Source: Norstat for DR Audience Research

<table>
<thead>
<tr>
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<th>2014</th>
<th>2016</th>
</tr>
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<tbody>
<tr>
<td>YouTube</td>
<td>13%</td>
<td>25%</td>
</tr>
<tr>
<td>Netflix</td>
<td>13%</td>
<td>25%</td>
</tr>
<tr>
<td>Disney</td>
<td>28%</td>
<td>36%</td>
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<tr>
<td>DR Ultra</td>
<td>22%</td>
<td>24%</td>
</tr>
<tr>
<td>Turner</td>
<td>11%</td>
<td>11%</td>
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<tr>
<td>Nickelodeon og Nick Jr.</td>
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anywhere at any time - and the 3-6-year-olds too have now started to take advantage of this. Music videos, animation films and dance videos, tractor pulling, unboxing and idols such as Messi and Ronaldo can all be seen on YouTube.

The way in which 3-6-year-olds use YouTube has become more varied than in 2014, and is similar to the way in which 7-12-year-olds also use YouTube. YouTube has enjoyed an explosive growth among older children too and is currently used by 70% of 7-12-year-olds every day or almost every day. The 7-12-year-olds differ from the 3-6-year-olds, however, in that they show a great interest in YouTubers such as Armin, Rasmus Brohave, PewDiePie and Naja Münster. Very few examples are seen among the 3-6-year-olds.

THE SMARTPHONE MEANS MORE FOR THE ELDEST

The changed media habits of the 7-12-year-olds have hit traditional TV hard, and this target group’s time consumption has fallen by almost a third since 2014. In 2016 just as much time was spent on streaming as on traditional TV, generally speaking. While the 7-12-year-olds spend a lot less time in front of the TV screen, the time consumption is increasing for both the tablet and particularly the smartphone. This is reflected in the fact that far more 7-12-year-olds were reluctant to be without their smartphones in 2016 than in 2014. The tablet is, however, a sure winner in the competition for which device they would be most reluctant to be without, with 42% stating they would miss it the most.

The screen time of the 7-12-year-olds has not risen since 2014, but there are certainly more options for children to choose from than ever before. This also means that the content providers, whether of games, video or TV, are in direct competition with each other for the 7-12-year-olds’ time. There is one more important player in the competition for the 7-12-year-olds’ time, and this is social media. Snapchat and Instagram in particular have gained popularity among 10-12-year-old girls, while only a small number of children of the rest of this target group use social media on a daily basis.

CHILDREN’S MEDIA BEHAVIOUR HAS PREDICTIVE POTENTIAL

Children are in the process of creating new media habits and traditions. Children were quicker at adopting the tablet and integrating it into their media usage, and the 7-12-year-olds are using smartphones to access the media to an increasing degree. In addition, children are adopting streaming services while, to a certain extent, turning their backs on traditional TV.

Children acquire new media interests as they grow up, for sure, but the abilities and habits they have adopted will hardly be lost. Hence, it is impossible to imagine that the present generation of children – when they become adults – will give away the control, make themselves comfortable in the sofa and wait for their favourite programme to be scheduled on a traditional TV channel.

Children’s media consumption is changing considerably, and the change is happening at a greater speed than among the population in general. It is to be expected, however, that the remainder of the population, like children, are changing their media habits and will be using the new possibilities to an even greater extent than today. As children are the first movers in a new media reality, their changed behaviour is likely to demonstrate that a lot of Danes will use content and media in new ways in the future.

There will, quite definitely, be differences in how and how often a ten-year-old and a 50-year-old use the new opportunities, but there is scarcely any doubt that traditional TV is facing an even harder future. Only a few years ago TV consumption was stable, and was even growing in the older target groups. TV consumption is now on the decline amongst older Danes too, while digital media usage is increasing. The older Danes will not necessarily copy their children in the years to come but there is much to indicate that the tendencies of the development that we have already observed in children will also extend to the older generation.
DISTRIBUTION OF TIME CONSUMPTION ON FACEBOOK VIDEOS FROM DR

The calculations are estimated on the basis of the time consumption of all videos from DR on Facebook.

Period: January-October 2016
Target group: Facebook users
Source: Facebook/Spredfast

5% With sound
95% Without sound
Videos are becoming increasingly popular on social media such as Facebook, Instagram and Snapchat, but by far the majority of the videos are viewed without sound. Why are silent videos so popular on social media, and when do users prefer to break the sound barrier?

By Rasmus Thaarup & Sofie Scheutz
DR Audience Research
Videos on social media are often viewed without sound. There are no overall figures for the use of videos, but 95% of the time spent on Facebook videos from DR, for example, are without sound. There are two key reasons for the comeback of the “silent movies”. Firstly, on most social media videos autoplay as you scroll down the page or they follow on from each other after you start to play the first one. Secondly, videos are played without sound as per default. But when do users prefer to “break the sound barrier”?

SOUND IS EMBARRASSING
It is not people but situations that break the sound barrier. You can be justifiably be excused if the phone rings, but not if you choose to watch a video with sound. DR Audience Research has carried out a study of a number of young users of social media, which suggests that people prefer to avoid situations in which others are disturbed intentionally. So what do people do if they are sitting on a bus and find a video they would really like to watch with sound?

“I wait until I’m in a place where I won’t be disturbing anyone before watching the video, but then I can’t be sure I’ll find the video again, or remember what I wanted to watch. I have tried this 100 times!”

Ulrik, 23 years

Hence it is not just a question of who prefers what, but more of what is preferred when. In public places in particular there are different ideas about what is acceptable behaviour. Most people are likely to have experienced being especially surprised at having the sound on when they least expected it.

“I would never dare to watch a Snapchat video with sound in a public place. I save it until I’m in a safe place.”

Julie, 19 years

Thus, there are different limits for when sound is acceptable. A safe move, if the sound is substantial and you would rather not make yourself too conspicuous, can be to dig out your headphones from your bag.

SOUND IS CUMBERSOME
But if headphones are to be dugged out of bags, it has to be well worth the effort. The first still image, provided that the video does not autostart, may be crucial for determining whether the user will use the sound. However, there are seldom great expectations:

“I often watch video clips without sound. That way I can see whether they’re totally random, or if they look like fun, so then maybe I’ll get my headphones out.”

Mikkel, 25 years
Users also mention that the autoplay function on Facebook, for example, can be a nuisance, as it draws you into a video carousel, where one video follows the other. The users end up in a stream of videos they did not choose themselves.

“I can’t be bothered to switch the sound on, because it doesn’t stop by itself and just goes onto repeat, even if you keep scrolling, and you suddenly find you can’t find your way back to the video to stop it.”

Agnethe, 30 years

Loss of control makes it difficult for the user, and can often be a reason why people do not bother with the sound. For silent videos, sub-texts therefore, become immensely valuable.

TEXT BEATS SOUND

It is of great benefit for the user if the video is accompanied by text. It provides the video with visual aids, and in many cases makes the sound unnecessary. In a test of four DR pages on Facebook over five months, videos with sub-texts on average had twice the reach, three times as many video views watched 95% to the end, and four times as many click to plays compared with non-text videos.

Sub-texts make it possible to watch videos when and where people want – without embarrassing themselves or having to bother with headphones.

“The other day I watched two trailers under the table during class, because they had sub-texts. I could just imagine how they were talking. I would never have done that with the sound on.”

Malou, 22 years

Hence, videos with text encourage users to watch more of the video or to watch it to the end, and they can also increase the likelihood that users will use the sound option. DR Audience Research’s study indicates, moreover, that there is no social medium in which the users prefer to watch videos with or without sound to a higher degree. Thus, the social medium in itself is not the decisive factor for users’ preference for watching videos with or without sound.

LONG LIVE THE SILENT MOVIE

A lot is at stake if you want the user to just consider breaking the sound barrier – from difficulty to embarrassment and widespread laziness. Video views without sound may possibly be a headache too for those who want to promote sound on social media, including streaming services and radio. If the broadcaster is to entice the user to break the sound barrier, the content must be worthwhile, and the headphones must be close by, unless the user is in a sound-proofed environment.
The great digital media personality test

Digital media are an integral part of our daily life, and for a great many of us technological development has sneaked its way into all aspects of our day-to-day existence. But there are still great disparities between when, why and not least how we use digital media - or maybe don’t use them.
If you too are curious about what digital media type you actually are, DR Audience Research has made things easy for you. Sharpen your good old analogue pencil and add up your points for each statement - or visit dr.dk/medieforskning to take the test online.

1. YOU NEED TO GO TO THE TOILET.
WHAT DO YOU DO?
- Get the visit to the toilet over and done with, so that you can get back to the real world as quickly as possible [1]
- Take your smartphone with you for a little distraction. A couple of goes on Wordfeud, a message of congratulations to a baby on Facebook and a like for your friend’s new year’s dinner table will do [3]
- Put your brand new Oculus Rift on and get the most fantastic VR experience out of the visit [5]
- You take the newspaper with you and enjoy the peace and quiet [2]
- You bring along your smartphone to optimise your time. You may just as well use the time effectively by checking the news and responding to emails if you’re sitting there anyway [4]

2. YOU ARE PLANNING TO SPEND AN EVENING WITH YOUR FAMILY OR FRIENDS IN FRONT OF THE SCREEN. WHAT DO YOU DO?
- You all watch your favourite programmes on each of your screens - but on the same sofa, of course. The idea was to hang out together! [5]
- You turn on the TV and flick through the channels until you find something worth watching - and you stick with it [2]
- You find a film on Netflix, which you can all agree to watch on the same screen [3]
- You check the TV guide to see if there’s anything you would all like to watch. There isn’t, so you grab a game of Ludo instead [1]
- You watch a couple of episodes from your new favourite series. However, you are not concentrating completely, because you watched it already without the others knowing, and so you spend more time on Facebook in the meantime [4]

3. YOU ALWAYS HAVE YOUR SMARTPHONE…
- One place or the other – maybe in your jacket pocket or your bag. “Ugh! 7 missed calls and 21 messages?”! [2]
- Close by, so you can hear it [3]
- Switched off [1]
- In your trouser pocket. In fact, all of your jeans have marks left from the shape of your smartphone [4]
- In your hand – and you always have one ear plug in your ear, so it’s quicker to use when the phone rings [5]

4. IT IS A MARGINAL FACEBOOK FRIEND’S BIRTHDAY – AND YOURS AS WELL SOON.
WHAT DO YOU DO?
- You wish them happy birthday and post a picture, as you know that your post will be seen high up in the feed [4]
- You live-stream a 360 video while you sing a birthday song [5]
- You contact the person personally and wish them happy birthday [1]
- You send a generic birthday greeting written with emojis [3]
- You don’t do anything, because the person is too marginal - and he/she won’t write you anyway [2]

5. YOU ARE AT THE BAKERY TO BUY A SOURDOUGH BREAD. HOW DO YOU PAY?
- In cash [2]
- With bitcoins [5]
- You bake all your bread yourself [1]
6. YOU TUNE INTO YOUR FAVOURITE RADIO PROGRAMME HALF AN HOUR LATE ON SATURDAY MORNING. WHAT DO YOU DO?

- A mere irritation. You probably haven’t missed much, so you just keep listening to the rest of the programme
- "Can’t you rewind on the radio these days?"
- No problem, you already subscribe to the podcast
- You can always stream the programme later, if you have the time
- You call the programme and hope they can solve the problem for you

7. YOU HAVE A 10-MINUTE BREAK AND WOULD LIKE TO BE UPDATED ON TODAY’S NEWS. WHAT DO YOU DO?

- You don’t check the news. If there’s anything important happening, Twitter will most probably keep you informed
- You carry on reading the newspaper from where you left this morning
- You use your breaks for unwinding and don’t read the news
- You check various news apps and news sites on your smartphone
- You check your Facebook feed, which gives you the news that is shared in your network

8. THE CONVERSATION TURNS TO WHETHER AUNT MØGHE IS 90 OR 100 YEARS OLD IN THE SHOW MATADOR. WHAT DO YOU DO?

- You leave the conversation – you don’t know the aunt they’re talking about
- You are Lise Nørgaard, so of course you know the answer yourself
- You have just seen the episode in one of DR’s many repeat transmissions of Matador, so you know the answer already
- You brush the dust off the box and fast forward to her birthday
- Everyone googles it all together, and you of course are the first with the answer

9. YOU ARE IN A RESTAURANT AND ARE SERVED A REALLY DELICIOUS MEAL. WHAT DO YOU DO?

- You think it’s a bit embarrassing but you sneakily take a picture
- You have never taken a photo of your food before and you wouldn’t dream of doing so either
- You take a photo of the dish, but put a nicer filter on it before it’s on Instagram #nofilter #foodporn
- You want to take a picture, but so does everyone else these days, so you consider yourself above all that
- You pull out your selfie stick and live stream on Periscope direct from the restaurant

10. IF TRADITIONAL FLOW-TV WERE AN ANIMAL, WHAT ANIMAL WOULD IT BE?

- A polar bear. Stands upright and proud on a melting ice floe without really knowing what has hit it
- A tortoise. Old school, but persistent. Is surely pushing 100 years too
- A lion. The king of the beasts. Boom!
- A panda. Rare and well-loved, but, for the sake of its image, needs to have its claws sharpened
- A dinosaur. Long extinct but they’re still making films about them
**The digital abstainer**

10–17 points

You are perfectly alive and well without going online. You are, actually, one of the few in your circle of friends who find out what the weather is like by looking out of the window, while everyone else goes around with their nose buried in their mobile phone. They’re always so busy – as if they’re chasing after something?

In fact, you have always managed to get by without technological gadgets, and your greatest digital challenge is setting your alarm clock from summer time to winter time and back again. You listen to the radio and watch television when the TV-guide in the newspaper recommend something interesting, but you don’t want to have anything to do with that “Onde Mand” everyone is talking about. You would rather spend your time visiting your family, writing a birthday card to a dear friend or baking a plate of scones for the freezer. And no, God knows, you have never taken a photo of your baking. After all, where would you hang it?

**OTHER DIGITAL ABSTAINERS LIKE YOU:**

There are probably two major personalities in Media Denmark who would fall into this category. But since neither Queen Margrethe II nor Lise Nørgaard can be contacted online, it has not been possible to have our assumption confirmed.

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**The digital tourist**

18–25 points

Although you do not necessarily have digital blood flowing through your veins, you are not afraid of getting to grips with all the fantastic opportunities technological development has given us. You are on the internet every day and are fascinated and frustrated at the same time that there can be so many recipes for cupcakes. And how does Google know which one tastes best?

You have welcomed social media and have embraced the opportunity to follow the development of your old school friends’ wrinkles, as well as what your kids are getting up to. You are not shy about making the odd comment on their pictures – as they’re the only ones who can read it, right?

Although your smartphone can do a lot of the things your good old computer can, you can’t be bothered to run around with your phone on you all the time. Mainly because it takes a long time to find it first, at the bottom of your bag – and before you’ve managed to take it out of its smart leather pouch and find the right app, you would have had the time for a regular game of Scrabble.

You decide for yourself when you want to go online, and don’t care much for being constantly disturbed by everything and anything from outside. Especially not in the middle of Strictly Come Dancing or all the other good TV shows, which should, of course, be watched together with the family when they’re broadcast – otherwise you won’t be able to vote by SMS!

**OTHER DIGITAL TOURISTS LIKE YOU:**

Kirsten Birgit Schiøtz Kretz Hørsholm (social critic and senior correspondent with Radio24syv – but who does not consider herself above watching Matador on DR1).

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**The digital pragmatist**

26–34 points

You are unable to see anything romantic about analogue fossils such as Krak maps, window envelopes, cash, hand-written shopping lists, bus passes, party invitations and SLR cameras. Your friends often blame you for ending all good discussions, because you’re the type that googles the answer to everything – but, let’s face it, you can’t waste a cheese-and-wine party by conversing with digital illiterates, can you?

Funnily enough, you are not particularly knowledgeable about the internet, and people who are not part of your network won’t get much out of snooping around your Facebook profile. You don’t bother much with photos, birthdays and promoting yourself on the internet. On the other hand, it’s really great to be able to use MobilePay for checking an unknown telephone number you got a call from on Saturday evening.

Digital efficiency is actually your hobby, and you don’t need news stories of more than 140 characters to feel you have been updated. You create your own news mix, as it is not possible to live by having to navigate your way around arbitrary news from all manner of providers. You would rather spend your time on streaming a few good documentaries and series instead – e.g. Skam (which did not entirely captivate you in terms of content – but it did have a really cool distribution form!).

**OTHER DIGITAL PRAGMATISTS LIKE YOU:**

Kristine Sloth (popular YouTuber and blogger – but never from the toilet), Uffe Elbæk (Party leader of Alternativet and former Minister for Culture. Can be recognised from the mark left by his smartphone in his Kaos trousers), Svend Brinkmann (professor of general psychology. Is able to stand firm and say no to everything – except for when it comes to looking ahead on the serial front), Ditte Giese (debate editor and cultural journalist with Politiken – who has obviously never seen Matador).
The digital exhibitionist
35–42 point

For you social media are a large part of your digital life: a blessing on the one hand, a curse on the other. Facebook and Instagram ensure that you are entirely in control of whose birthday it is when, which café froths up the best latte heart, which pop-up restaurant your favourite blogger thinks is the hippest, and which series Soundvenue believes you should be following at the moment. On the other hand, it's hard having to be online all the time and from time to time you get a cold turkey and delete all your SoMe apps from your phone - only to install them again the moment you miss your first event invitation.

You live according to the motto “You are what you post”, and are generally conscious of how you appear online. For the same reason, you hate it when people have closed profiles, because this makes it utterly impossible to gain a proper impression of them as persons.

Sometimes, however, all this social stuff on the internet can be a bit excessive. It may well be smart to see what new music your friends are listening to on Spotify, but not everyone needs to know that now and again - in a moment of weakness - you listen to Rasmus Seebach.

OTHER DIGITAL EXHIBITIONISTS LIKE YOU:
Robin and Samrita (YouTube personalities, gamers and vloggers - with a propensity for a good old-fashioned round trip through the channels on the box), Nikita Klæstrup (political debater, photo model and reality star, who feels naked without her smartphone), Keld Reinicke (experienced TV personality and visionary digital consultant. Has difficulty expressing himself at less than 360 degrees), Julia Sofia Aastrup (life style YouTube celebrity and illustration of the fact that you can be young and digital, while at the same time publishing paper books and leaving your mobile in your jacket pocket).

The digital pioneer
43–50 points

If your attitude to digital media were to be articulated on Facebook, it would state “It’s complicated” in every case if your circle of friends were to be queried. You are unable, however, to see anything complicated at all in always remaining abreast of technological development - even if this has also resulted in a number of wrong purchases over the years (the hue lighting in the bedroom wasn’t all that sultry either!). However, you’re not on commercial social media for ideological reasons, and in fact only use encrypted messages in digital communication - after all, there’s no reason to serve up your private life on a silver platter to the NSA.

You are always the first in your circle of friends to try out new technological achievements, and whenever something new is launched on the market at home, you are guaranteed to have already tried it at last year’s SXSW.

You are way beyond the 3D thing – now it’s AI and VR that are all the rage – and if it were left to you (and not your children), you would rather take a turn on Oculus Rift than the rollercoaster in Tivoli Gardens. But it is always only a matter of time, for as soon as something becomes mainstream you lose interest and rush ahead to the next thing.

You have shaved and cut – and after a while you can’t remember when you last saw an old-fashioned TV programme. So you would rather Periscope, blog, tweet or otherwise create your own digital content yourself, in order to please your followers (and your Klout score).

OTHER DIGITAL PIONEERS LIKE YOU:
None! Not even Nikolaj Sonne, whose avocado fans and latte hearts obviously stand out clearly enough without an Instagram filter.
Data in the present publication are also taken from studies carried out amongst DR’s own internet panel, the DR Panel. DR uses the DR Panel to carry out regular studies of media habits and views of media content in Denmark. Anyone over the age of 15 and resident in Denmark may become a member of the DR Panel. You can apply to the DR Panel and read more about it at dr.dk/dpanelet.

A brief summary of DR Audience Research
DR Audience Research is DR’s own department of audience research. It is an independent department, with the aim to present the points of view of listeners, viewers and users on DR’s many products and to follow the media development.

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