The Development of Media 2011

The DR Audience Research Department’s annual focus on the development of the Danes’ use of electronic media
In 2011, the Danes’ media use has been characterized by two main trends. The traditional media use is very stable and we have seen significant changes in the Danes’ use of new media. These trends are highlighted in this year’s edition of The Development of Media.
In 2011, the Danes’ media use has been characterized by two main trends. The traditional media use is very stable and we have seen significant changes in the Danes’ use of new media. These trends are highlighted in this year’s edition of The Development of Media.

The Danes spend a lot of time on the two main forms of mass media, TV and radio. Even though 2011 has not given rise to further increase in TV viewing, the Danes nevertheless spend much time in front of the TV. On an average day in 2011, a Dane spent 3 hours and 18 minutes watching TV. Radio has lost listening time, but we are talking very small losses compared to the media’s high standards. Danes listen to the radio for an average of 2 hours and 1 minute per day. In other words, the Danes’ use of the traditional broadcast media is very stable.

The Danish media habits are also changing, however. In 2011, the number of Danes who were online via their cell phones daily doubled to over a quarter of all Danes. Moreover, the Danes are avid users of the Internet in front of the TV, which is attributed to an increased mobility of computers and access to wireless Internet in most Danish homes.

We do not have the vocabulary yet to describe and understand the new opportunities that arise with the Internet. The Internet is an independent type of media where users can visit web sites, and it is also a distribution channel that delivers content to other media, for example to newer television sets, set top boxes, gaming consoles and radios. Does this mean that watching a TV show on a cell phone is a TV experience? Or is it a new type of experience?

We are living in a modern world that challenges our way of understanding and analyzing media use. New and old media coexist and complement one another. Thus far the issue has not been whether one type of media replaces another type, but rather that the total amount of time we spend on media has increased with the arrival of new media. You can read much more about the current media environment in Denmark in The Development of Media 2011.

I hope you enjoy reading the report.
For how long do Danes watch TV each day?

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

2h 31 min 2006

3h 18 min 2011
Another year with a lot of tv viewing

Although 2011 will not go down in history as the year when the Danes watched the most TV, they still switch on the TV many times a day. The Danes have spent the majority of their time in the company of the four Danish TV stations. New opportunities are waiting for the Danish TV viewers and they will soon have a greater say in how they assemble their own television packages.
The recent years’ boom in TV usage did not continue in 2011. After three consecutive years of viewing time records and an annual growth of 11% on average, the TV usage decreased by 1% in 2011. The average Dane watched 3 hours and 18 minutes of television per day, so although the explosive growth in daily viewing time has leveled off, the Danes still spent a lot of time in front of the TV. The many hours a day in front of the TV were primarily spent on the four large TV stations, which are TV 2, DR, Viasat including the TV3 channels and SBS with among others Kanal 4 and Kanal 5. These four players were responsible for a total of 84.6% of TV viewing in Denmark, which is an improvement of 0.9 percentage points compared to 2010. In other words, they are still very dominant on the Danish TV market.

The decline of the main channel was more than offset by the other TV 2 channels, which all advanced in 2011, with the exception of TV 2 Film. All in all, the TV 2 family concluded 2011 with an average audience share of 39.8% in 2011 compared to 39.1% in 2010.

TV 2 News, the TV 2 family’s record breaker, had a year with many big news stories, much like DR Update. And TV 2 increased its audience share from 2.8% in 2010 to 3.5% in 2011. TV 2 Charlie also advanced in 2011 and, with an audience share of 3.8% against 3.4% in 2010, can now call itself Denmark’s fifth largest television channel. TV 2 Charlie caters to an older audience that watches a lot of TV and weighs heavily when the total ratings are added up.

DR: The three latest niche channels improve
Also the DR family came strengthened out of 2011 with an increase: the result was an annual share of 28.3% of the total TV viewing compared to...
Audience shares allocated on channels in 2010 and 2011

24 hours
Age group: 3+ years
Source: TNS Gallup TV-Meter

<table>
<thead>
<tr>
<th>Channel</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV 2</td>
<td>28.1%</td>
<td>27.4%</td>
</tr>
<tr>
<td>DR</td>
<td>19.2%</td>
<td>18.8%</td>
</tr>
<tr>
<td>TV3</td>
<td>13.5%</td>
<td>14.1%</td>
</tr>
<tr>
<td>SBS</td>
<td>1.4%</td>
<td>1.7%</td>
</tr>
<tr>
<td>Others</td>
<td>27.4%</td>
<td>28.3%</td>
</tr>
</tbody>
</table>

Percentages are rounded to the nearest 0.1%.
27.9% in 2010. Much like in 2010, the increase can be attributed to the three newcomers: DR HD, DR Ramasjang and DR K as well as DR Update.

In spite of DR’s total progress, DR1 is still losing audience support. However, the decline is smaller than previous years and the total audience share in 2011 was 18.8% compared to 19.2% in 2010. The decline is partly attributable to Fridays and Saturdays, which in 2011 had to do without Talent (a Danish talent show) and a number of old Danish movies that had been popular among viewers in 2010. DR2 also lost a bit of terrain in 2011, and went from an audience share of 4.6% to 4.3%. The relocation of Bonderøven (a farmer who lives the old fashioned way) to DR1 has meant that DR2 had a weaker grip on the Danes on Sundays. On the other hand, Saturday theme days had a very strong year.

While DR1 and DR2 may report a decline in audience share, DR Ramasjang has increased and concluded 2011 with an audience share of 2.1%. Ramasjang advanced even more among the 3-10 year olds and had a great year with 19.7% of total TV viewing. Along with DR1, DR Ramasjang is therefore the channel that the children spend the most time in the company of. Both DR K and DR HD also increased their audience shares a bit in 2011. The increase of DR HD is due to an increased market penetration and because more than half the population is now able to watch the Sunday drama in a razor-sharp image quality.

Viasat and SBS: Status quo among the commercial channels
Viasat and SBS share almost the same story in 2011. While TV3 decrease a little, the other channels in the Viasat Group increased a little. SBS experienced growth with 6’eren and losses with the other channels. All in all, the overall result for both groups remained practically unchanged in 2011 compared to the 2010 levels. In 2011, the main channel TV3 experienced a 0.5 drop in audience share points compared to 2010. The channel was hit hardest on Mondays, where the 15th season of Robinson Ekspeditionen (Survivor) did worse than previous seasons. In recent years, TV3 and Kanal 5 have focused on airing own productions on weekdays from 7-8 p.m. – typically food programs with a competitive edge. Programs like Master Chef, Til middag hos (Danish cooking program with celebrities) and 4-stjerners middag (another Danish cooking program with celebrities) lost terrain on both channels compared to similar programs last year.

Increase in television advertising revenue in 2011
The financial crisis still has a firm grip on society, but the television advertising market...
has nevertheless experienced an increase in 2011. Growth rates exceeding 20% during the first half of the year actually looked very promising, but in the autumn, the picture changed somewhat. At this time, the annual result is not fixed, but different statements suggest an increase exceeding 10%. For example, Mediawatch has concluded that the increase of 14.5% on average in television funds will pass through the four major media agency groups, IUM, OMD, Group M and Aegis. Various studies indicate that the advertising market will not increase to the same extent in 2012. A likely scenario for 2012 is that sales will remain at roughly the same level as in 2011. Nevertheless, maintaining turnover from 2011 will equal conparerably more advertising funds for the commercial television stations than when the financial crisis hit the market in 2009.

New possibilities for combining television packages

Television stations that are dependent on subscription revenue are most likely heading towards an uncertain future. On 3 November 2011, the Danish Competition Authority released the report, “The Distribution of TV Channels”, which recommends a so-called a la carte selection of channels. This is a model that gives TV viewers the possibility of choosing which channels they are interested in subscribing to – regardless of package structures. The report recommends political interventions to ensure the recommended changes. At this time, however, we see indications that the politicians prefer to wait and see how the players on the market solve this task of an increased freedom of choice.

One effect of an increased freedom of choice will probably be that the average Dane will have fewer channels. The main argument for the change is that it will give consumers the opportunity to avoid paying for channels that they will never watch, and a reasonable assumption is that a certain percentage will grab this opportunity. Many of the smaller channels are highly dependent on a business model where they receive turnover from subscriptions, so an increase in an a la carte offering will place a great deal of pressure on these channels. In Norway, a working group under the Ministry of Culture issued a report similar to that of the Danish Competition Authority, but with a different conclusion. The Norwegian report indicates that a pure a la carte model is likely to reduce the price, quality and channel diversity that consumers receive for instance in the form of niche channels being shut down.

Increased choice can slow fragmentation

For a while now, the large main channels have battled for their audience shares, as there are more and more niche channels. Even the niche channels relinquish viewers to each other. This fragmentation of TV viewing may prove to decrease if the increased freedom of choice makes headway. Many niche channels will have fewer funds to produce television content, and it could become reality for a few niche channels that they may have to close.

This may end on either a positive or a negative note for a media company like TV 2. The small channels, including TV 2’s own smaller channels, are under pressure for subscription earnings. On the other hand, it may prove to give the main channel more airtime in their battle for viewers.

When all is said and done, no one can predict how consumer behavior can be triggered by an increased freedom of choice. TV viewers today receive bulk discounts when they buy packages with TV channels. A lot will also depend on distributor pricing. If the Danish TV viewers do not feel they are saving enough by opting out of a number of channels, then the a la carte trend can quickly become a niche phenomenon.

Although the commercial channels are heading towards uncertain times, it is far from synonymous with the fact that this business model is ruled out. On 11 January 2012, TV 2 will begin charging subscriptions for their main channel. At the moment, many agreements with distributors are in place, so it seems unlikely that the channel will suffer a significant loss of market penetration. TV 2 has even announced that they eventually expect to lose about two percentage points in market penetration.

Broadcast television will no longer be sent in the so-called MPEG2 format from 11 January 2012. There will be a shift to the newer standard MPEG4. This means, among other things, that TV 2’s regional channels will get their own channels with extended airtime. Currently they share airtime with various local TV stations and sign language interpreters. With the exception of the regional news at 7.30 p.m., the regional channels have a very small proportion of viewing time. But by getting their own channels, new opportunities may arise. Two conditions for growth are met by managing the entire range of programs on the new regional channels independently combined with a blockbuster show at 7.30 p.m. on TV 2’s main channel.
Radio listening in 2011 distributed on platforms.
The figures apply to DR’s channels, as the whole market is not divided into platforms.
Age group: 12+ years
Source: TNS Gallup Radio Meter
The Danish radio market is changing

After some quiet years, 2011 brought about considerable changes on the Danish radio market. Radio24syv saw the light of day and took over P2’s FM frequency. P2 moved in with P1 on the FM band, and a new commercial channel with classical music was started. The commercial market collectively advanced, but DR still comprises more than three-quarters of the Danish radio listening.
In 2011, the radio media continued the overall trend we’ve seen for many years; both the number of radio listeners and the total listening time decreased. The daily listening time for a Dane in 2011 was 2 hours and 1 minute, which is two minutes less than in 2010. Since 2008, the radio media has lost a total of 10 minutes of listening time. It is worth noting that the decrease in listening time is becoming smaller from year to year. The decrease in 2011 was lower than in 2010, which in turn was lower than the decrease in 2009.

In 2011, 94% of the Danes listened to the radio every week just like in 2010, although levels were marginally lower. So, radio media is still used by the vast majority of Danes. When it came to listening to the different platforms, there were no major changes in 2011. 89% of radio listening time was still via FM, while 8% of the listening was done on DAB and 3% via the Internet.

**DR decrease**

While commercial radio advanced in 2011, DR regressed. Each week in 2010, 87% of Danes listened to DR’s radio channels and in 2011 the figure had decreased to 86%. At the same time, the daily listening time fell from 1 hour and 39 minutes to 1 hour and 35 minutes. As a consequence, DR’s share of total radio listening fell from 80% in 2010 to 78% in 2011.

DR’s development must be seen in the light of a significant change of the total offering in 2011. At the end of 2011, DR had 11 channels compared to approximately 30 channels the previous year. This means that currently the 11 channels have had almost the same listening share as the 30 channels had last year.

In 2010, 25% of Danes listened...
to DR’s digital channels every week and in 2011 this level diminished to 23%. At the close of 2011, DR’s digital channels consisted of P5, P6 Beat, P7 Mix, P8 Jazz, DR Ramasjang, DR Mama and DR Nyheder. Despite the fact that fewer Danes listened to the digital channels in 2011, they still had 5% of the total listening time, which is status quo compared to 2010.

**Radio24syv and talk radio**

Radio24syv became a player on the Danish radio market on 1 November 2011 when the radio station took over P2’s space on the FM frequency, the so-called FM 4 frequency. Radio24syv is run by Berlingske People, which is a collaboration between Berlingske Media and People Group. Berlingske People were the only ones who bid on the FM 4 frequency, which is financed by government license fees and has a number of detailed requirements. This means that there is now a license-funded alternative that provides talk radio, and is therefore in close competition with DR P1. Not only is it the first time that DR experiences competition on the talk radio front, but now the Danes have a public service radio alternative that does not operate under market conditions.

Radio24syv’s first radio listening figures have shown that the channel had 408,000 listeners per week in the first two months, which is more than many had expected. It was on par with P2’s listening figures during the same transmission frequencies the previous month. Nevertheless, P1 was still the biggest talk radio station in Denmark with 709,000 weekly listeners and a radio listening share of 6% after the reorganization in November 2011. In comparison, Radio24syv’s listening share was at 2%, and the big difference is due to shorter listening time on Radio24syv than at P1.

Radio24syv has to some degree helped lift talk radio’s share of the total listening time. Talk radio’s share was 7% until November 2011 when Radio24syv opened. The rest of the year, talk radio’s share was 8%. Radio24syv has also helped increase the overall radio listening time from 2 hours and 1 minute per Dane in January-October to 2 hours and 4 minutes in November and December.

**P1 and P2 are roommates**

1 November P2 moved to the P1 FM frequency in the evenings. At the same time, it changed its name to P2 Classic, because in the future, the channel will be a purely classical channel. This is possible because DR is no longer bound by the P2 license requirements of mixing the classic format with other elements.

A big difference is not immediately discernible when assessing the listening figures for P1 and P2 in 2011, as opposed to 2010. When seen from the perspective

---

**Top 10: Number of weekly listeners in 2010 and 2011.**

Listeners in thousands. 2010 ranking in parentheses.

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>P4 Total</td>
<td>2.899</td>
<td>2.890</td>
</tr>
<tr>
<td>P3</td>
<td>2.280</td>
<td>2.303</td>
</tr>
<tr>
<td>NOVA fm</td>
<td>1.365</td>
<td>1.330</td>
</tr>
<tr>
<td>The Voice Total</td>
<td>0.746</td>
<td>0.812</td>
</tr>
<tr>
<td>P1</td>
<td>0.706</td>
<td>0.717</td>
</tr>
<tr>
<td>Radio 100</td>
<td>0.802</td>
<td>0.650</td>
</tr>
<tr>
<td>Pop FM</td>
<td>0.147</td>
<td>0.588</td>
</tr>
<tr>
<td>P2 Klassisk</td>
<td>0.429</td>
<td>0.439</td>
</tr>
<tr>
<td>Radio Soft</td>
<td>0.289</td>
<td>0.296</td>
</tr>
<tr>
<td>DR P7 Mix</td>
<td>0.231</td>
<td></td>
</tr>
</tbody>
</table>
of the broadcaster, it is not an ideal situation when two different formats share the same frequency. The consequences, nevertheless, have been smaller than many perhaps expected, because the first ten months in 2011 were "business as usual". And therefore, the unusual situation following the move on 1 November did not make a significant impact in the annual statement.

When assessing the 2011 development before and after the merger, P1 had 719,000 listeners a week until 1 November, while P2 had 434,000. P1 maintains its listeners and P2's increased after 1 November, so that P1 had 709,000 listeners and P2 had 466,000. The consequence of the merger was apparent in the listening shares, as P1 decreased from a listening share of 6.9% to 6.3% after the merger, while P2 experienced a greater decline from 4.6% to 2.9%. This is due first and foremost to the fact that both channels lost approximately 50% of their airtime on the FM frequency. And because P2's FM broadcasting time is at night, the loss is greatest for P2. The shift has also had the result that both channels' digital listening time has increased.

Classical music on commercial terms
Since P2 stopped broadcasting on its own FM frequency, there has been an opening in the market. So, the commercial radio company, New Radio, opened the station Radio Klassisk, which airs classical music. This is the first time a commercial radio operator opens a radio station without pop music, since the closure of the rock station Radio City in 2008.

In 2011, Radio Klassisk started out with non-stop music, but hosts will be added from January 2012. Since the beginning in October, 86,000 Danes tuned in to the frequency each week, while P2 has had 467,000 weekly listeners in the same time period. Much like with Radio24syv, the challenge seems to be the limited listening time, which gives the channels a modest listening rating of 0.4% against P2's 3% over the same period of time.

Spotify launches in Denmark
The battle for listening time is not limited to the radio stations. Now, the radio media itself will be battling new competitors for listening time. In the fall of 2011, the Swedish music streaming service Spotify launched a version in Denmark. Denmark has had streaming services like WIMP from Telenor and TDC Play for several years, so this is not a new phenomenon in Denmark. Users can listen to music for free on Spotify, which has a large music selection and has received broad media attention.

Our Nordic neighbors have had access to Spotify for a long time, and several studies have indicated that the service has played a part in the decline of radio use in Sweden. So far, the same development is not visible in Denmark, as radio listening has not decreased more than usual after Spotify's launch. Spotify is not a radio media, but an on-demand music service, which can be foreseen to challenge music shops and service providers. On the other hand, streaming services should not be neglected as a way of changing media behavior in the long run. And 2012 will provide an indication of whether or not Spotify or another music streaming service will penetrate the Danish market so heavily that it also affects radio listening.
The 10 largest web sites in Denmark measured in visits

Monthly number of visits in millions. Average for January to October 2011. 
The list is based on two different measurements, both of which have been conducted by FDIM/Gemius. FDIM members' figures have a higher validity than web providers that are not members of FDIM. Non-members are marked with *

Audience: 15+ years
Source: FDIM / Gemius
The slow and steady growth of the Internet

Although the Internet is developing, there is a limit to how much Internet use via the computer is increasing. On the other hand, the Internet is being used in new contexts. As we speak, Internet use via cell phones is rapidly growing while Internet use via tablet computers also has the potential for long-term growth.

By Carsten Andreasen and Uffe Høy Svenningsen
DR Audience Research
Most Danes have access to the Internet in their own homes, and those without access are a dying breed. Over time approximately 11% of Danes never use the Internet and almost 3 out of 4 Danes use the Internet daily. In 2005, this figure applied to only half of all Danes. Looking at the development of Internet usage in 2011, it is limited how much use on PCs has increased compared to 2010, however the net usage via cell phones has increased extensively.

Of course there are differences in the Danes’ net usage and the most active users are males under 40, living in large cities. If we ignore the age factor, the differences are not significant. It is the Danes above the age of 60 that use the Internet less than the remainder of the population. However, many Danes still have a difficult time using IT and the Internet, as figures from Statistics Denmark have shown.

More traffic on major news sites
2011 has seen no significant shifts in the size ratio between the largest Internet providers in Denmark. The 10 most frequently used web sites weighed heavily in the total Internet consumption and they accounted for almost half of the Danes’ total web site usage. 18% of the time was spent on Facebook alone. Once again the two largest players, Google and Facebook, experienced growth in terms of visits. Also Facebook was used by well over half the Danish Internet users, and Google was used by practically everybody. This means that their Internet offers will play an even more significant role in how the Danes search for content on the Internet. Google (including YouTube) and Facebook accounted for more than a third of the total time spent among all Danish Internet users. And if we look only at the 15-25 year olds, the two players took up almost half of the time spent.

While readership of print newspapers has decreased the latest years, Danish newspapers have managed to increase the traffic on their online editions. The five major newspapers also continued their 2011 growth measured in monthly visits compared to the previous year. BT.dk took the lead with 29% while Politiken.dk (+20%), Berlingske.dk (+14%), JP.dk (+10%) and EB.dk (+8%) also showed good rates.

The growth can be attributed to several factors, the most important being that reading the news online has become a much more natural way for Danes to stay up-to-date on current events.

This year’s national elections are a solid indication of the growing role of the online media in terms of news. The total number of visits to the web sites of the five large newspapers has increased more than 60% in the period from the start of the election period to election day in 2011 compared to the corresponding election period in 2007.

A large commercial market
In terms of media, the online segment has become a significant part of the total Danish advertising market. Estimates for online sales are subject to large uncertainty, particularly because the largest player, Google, does not publish its Danish figures. According to DRIB, which is the trade organization for media buyers, 18% of the total advertising consumption is via the Internet and therefore larger than the newspapers, but still under half of TV advertising consumption. Other sources, such as the online trade organization, FDIM, work with significantly larger numbers for the online turnover and according to a survey of advertising spending conducted by Dansk Oplagskontrol (the Danish Audit Bureau of Circulation), the Internet is the largest advertising media in Denmark with advertising shares of 28%. In spite of the varying estimates, there is no doubt that many advertising funds, particularly within the past five years, have gone to the online media. The print media has paid the price for this development.

Even though the precise figures are an unknown factor, a certain percentage of Internet use is often followed up by advertising funds, meaning that Google and Facebook rake in many of the Danish advertising funds. Industry sources estimate that Google’s share of the total Danish online turnover is approximately half and a significant share is sent Facebook’s way as well. This is noteworthy from a Danish perspective, because large parts of earnings therefore are sent out of the country to foreign companies as opposed to Danish content producers, which affects the ability to run a business with independent Danish content.

New times for the Internet
Even though the Internet’s pioneering days are long gone, many new things are still happening. Faster Internet connections, wireless networks and laptops have impacted development lately and now smartphones and tablet computers are helping to make the Internet omnipresent. The cell phone is redefining where we use the Internet to an even larger degree than laptops already have. Smartphones give access to the Internet everywhere and at all times without having to wait for a computer to start up. Tablet computers have the same possibilities as smartphones, only with an even bigger and better screen.

With its new services, the Internet has eliminated many users’ CD collections. In October, Swedish Spotify launched a Danish version of their music streaming service. Spotify is the first music streaming service
in Denmark which can be used free of charge and which is also a completely legal alternative to for example downloading. When Spotify was launched, it was mandatory for new subscribers to create accounts with a Facebook login, which has helped market the service. Therefore, the next question is: will Spotify be as big a success in Denmark as it has been in Norway and Sweden? In November 2011, Spotify announced that it had reached 2.5 million paying customers worldwide. If the service can continue to increase the users’ willingness to pay, this is a clear indication that an attractive business model for music lovers and license holders can be created.

There has also been considerable development surrounding film and TV series on the Internet. DR, TV 2, MTG and SBS TV all have serious Internet TV offers for Internet users, and the Danes also have the possibility of watching films and TV online through other services. For instance, Swedish Voddler has been on the Danish market since 2010 offering rental movies and free movies and Apple opened the market for renting movies through Danish iTunes in 2011. YouTube started offering film rentals in Europe when it entered the English market in 2011, and this service will probably be seen on the Danish market at some point. Thus, we see a development where the national copyright barriers are opened up and large international players entering the field. Just as we see the mobile web evolving, we will also see more devices with direct access to the Internet in the coming years – including television screens. Also here the current slack in the national copyright barriers will mean that users will have much more opportunities when they compile their media use.

The 15 largest web sites in Denmark in 2011 measured in visitors 2011

The list is based on two different measurements, both conducted by FDIM/Gemius, where the FDIM members’ data has a higher validity than Google, Facebook and other suppliers that are not members of FDIM. Non-members are marked with *

Where do you use the Internet and spend time on your apps on your smartphone?

- 56% On the sofa
- 40% As a passenger (bus, train, car, etc.)
- 37% In bed
- 35% While I’m waiting, for public transportation for example
- 32% At work
- 24% In the bathroom

Percentage of smartphone users.
Age group: 15-70 years
Source: TNS Gallup Mobile Devices 2011
The Danes carry the Internet in their pockets

The mobile web is moving into the Danes’ lives with great strides. 28% of the Danes use the Internet on their cell phones almost on a daily basis, and that is more than a doubling in just one year. The term “always on” has become a reality for many Danes because the Internet is accessible at any time and any place.
Cell phones have had high expectations in recent years, but the mobile web’s breakthrough has been a long time coming. In 2010, DR Audience Research was able to establish that the breakthrough was about to happen, and now we are making it clear that it has happened – and that it will have profound implications for our perception of the Internet and media devices in years to come.

Faster and better cell phones, dramatically lower data prices and a large supply of content has truly motivated the Danes to use cell phones for other purposes than text messaging and phone calls. In the early summer, more than a third of all Danes had a smartphone, according to TNS Gallup. And new figures from MegaFon in the fall show that 28% of Danes access the Internet from the cell phones practically every day. This figure has more than doubled in just one year.

**Women always have Facebook on hand**

Men, employees or students still make up the majority of mobile web users, however, mobile web use is becoming more common among women. The fall of 2010 saw only 8% of women using the Internet from cell phones on a daily basis. Now 25% use it. So, we have moved past the technology happy men and are now welcoming their wives and daughters. Previous studies of the Danes’ media and cell phone behavior have shown that women have used their cell phones for other purposes than just texting and talking for a long time now, but they have not used their phones to access the Internet. Now women are hooked on going online with their smartphones, and this is without a doubt attributable to user-friendly cell phones, significantly lower prices for data and the entry of social media on cell phones. When their Facebook status needs updating the cell phone is always on and a status can be updated in the blink of an eye.

Social media sites like Facebook and Foursquare have not only enabled us to share our thoughts, but they have also allowed us to share our geographical location with our friends, and this phenomenon has also become increasingly popular with men and women alike. Almost one in every ten Dane shares his or her geographical location daily through apps like Foursquare, Google Latitude and Facebook Places.

**Couch surfing**

For many years, we have primarily associated cell phones with behavior outside the home, but TNS Gallup’s Mobile Devices study from the spring 2011 shows that it is meaningless to try to make sense of the new smartphones as something we only use when we are out and about. 56% of smartphone users use their apps while sitting on the sofa, where most users have the ability to use their laptops as well. So, the sofa has become the Danes’ preferred app location. Of course many also use the new possibilities when they are passengers in cars or public transportation (40%) or at work (32%), but the home is as much home field for the smartphones when we are talking use of the many new possibilities.

This is because it is easier to reach for a phone to quickly check your online banking, the news or email than to switch on the computer. For many people, the use of apps means an increase in functionality and a decrease in complexity, and they often have highly customized uses in areas where the computer previously has been the primary access point. Users are often able to access their wireless network when they use their smartphones at home. At home WiFi connections are quicker and give more opportunities for using video and music, and distractions of the more relaxing nature are well suited for the couch or the bed. At the same time, it is easier for many people to use a smartphone in social situations. It is less disruptive to quickly check the weather or the result of a football match on the phone than having to switch on the computer. Since the end of the 1990’s we have gotten accustomed to using cell phones in everyday situations and the smartphones profit from this today as a multimedia device.

It’s hard to be acknowledged as an app

A new and exciting world of apps has opened up, which have become a very important part of cell phone use. According to TNS Gallup, the same number of smartphone users use apps from their smartphones as they browse web sites on their phones. We also have learned from a study in the DR Panel that almost the same amount of users read the news via apps as by logging onto a web site in the cell phone’s browser. Although apps have become a buzzword in record time, this does not mean that Danes use hundreds of apps. In fact, it indicates that most smartphone users only use relatively few apps. Approximately half of app users do not use more than 5 apps on a weekly basis. This indicates that many smartphone users download certain programs to their phones that enhance its functionality. Also, this indicates that it is difficult for apps to become a part of the user’s daily use.

The cell phone will affect the traditional Internet

Another interesting phenomenon is that surfing the Internet is a big part of mobile behavior. A TNS Gallup survey shows that about 65% of smartphone users surf the Internet from their cell phones every week, which is
just as many who use apps. For many content providers on the Internet, the answer is to direct users to an adapted mobile version of their web site. To give an example, Google and Facebook use this strategy. We also see that Apple, among others, does not make Flash available on their cell phones, which is why an open standard like HTML5 is gaining market shares. Does this development show us the contours of an Internet where simplicity and simple design will gain an even more predominant role? Users will come to expect that new Internet possibilities are not just limited to certain types of computers and browsers. And in turn, this will influence content providers to create new solutions that can be used across all devices with Internet access, which will influence the degree of innovation on the Internet, because delivering content across devices and browsers will be a competitive parameter in the future.

Computers are getting smaller and more portable
The big brother of the smartphone, also known as a tablet computer, is in many ways reminiscent of smartphones. They have small screens, which are too big to fit in a pocket, but they share the same control systems and programs as smartphones. According to a Megafon study in the fall, 9% of Danes had tablet computers, and in particular Apple’s iPad, which the Danes are especially attracted to. It is highly likely that more Danes will have tablet computers in the future. If this development continues, it will only serve to enhance the requirements for open standards and web sites, which can be used across smartphones, tablet computers, laptops, on gaming consoles or maybe even on the TV. Our Internet use is changing and we will see that we are using it in new situations, which are no longer bound by a need to sit in front of a computer screen using a keyboard.

Apps and smartphones
An app is a program, which can be installed on a cell phone. These phones are often called smartphones because they are a combination of a small computer and a cell phone. An app can be anything from a leaflet from a supermarket chain to an advanced GPS system that can give directions all over the world.

About the study
The article is based on two studies. One study, Mobile Devices 2011, is conducted by TNS Gallup in the spring of 2011 among 3,962 participants. Furthermore, DR Audience Research has studied the Danish cell phone habits in cooperation with Megafon in October/November 2011. Here, 1,057 participants aged 15+ participated in the study.
How often do you use the Internet and watch TV at the same time?

Age group: 15+
Source: Megafon

- 6% No internet access
- 35% Never
- 11% Monthly at the most
- 12% Weekly
- 36% Daily
Many Danes surf the Internet while watching TV

For many of us, watching TV is closely connected to being online. A new study have shown that over half of Danes use the Internet while they watch TV and we have reason to believe that the level will increase in the future.
In the course of a week, half of the Danes use the Internet while watching TV. This is the conclusion of DR Audience Research and Megafon’s study of a representative segment of the Danes’ media behavior when watching TV. Everything indicates that this is a macro trend, as studies from NRK in Norway and the Nielsen Research Institute in the US paint a similar picture.

In the total group of Danes who have access to the Internet, almost 40% use the Internet daily while watching TV while approximately 40% never do it. Roughly speaking, there are two types of TV-viewers in Denmark: those who watch TV and often combines this with surfing the internet, and those who never surf the Internet while their TV is on.

The Internet is leaving teletext in the dust

It makes sense that the Internet is taking over during TV viewing time, because the media has been distributed to most Danes now. But using the Internet while watching TV challenges the way many perceive traditional TV viewing, where family and friends are assembled in front of the TV to watch the same program. And even though books, newspapers and magazines are placed on coffee tables close to the TV screen in many Danish homes, and have done so for years, they are missing the dynamic and interactive potential, which is the cornerstone of the Internet. In comparison to the traditional print media, and even teletext which is built into the television and many users’ habits, the Internet now plays a dominant role during the Danes’ TV viewing – at least among users who have access to and use the Internet. Additional figures from the DR Panel support this. On any given day, approximately 50% of the people who watched TV answered that they had also used the Internet at the same time. In comparison, approximately 40% used teletext and approximately 20% had used a print media while watching TV on that day.

Nevertheless, determining how much time Internet consumption takes up during TV viewing is difficult because it is hard to measure. Consumption varies from person to person and the Internet use can be quite moderate in some situations, and in other situations it can be broadly used during the entire TV viewing situation.

The Internet provides companionship in front of the TV

DR Audience Research has examined, via the DR Panel, how media multitaskers use the Internet while watching TV. According to Gallup’s TV-Meter measurements, we are alone more than half of the time we spend in front of the TV, and it is when we watch TV alone that the Internet plays the biggest role. According to the vast major-

---

### In what situations do you usually use the Internet while watching TV?

Percentage of panelists who use the Internet and watch TV simultaneously and who have answered frequently or often.

<table>
<thead>
<tr>
<th>Age group</th>
<th>When I watch TV alone</th>
<th>When I watch TV with others</th>
</tr>
</thead>
<tbody>
<tr>
<td>15+</td>
<td>73%</td>
<td></td>
</tr>
<tr>
<td>15-29 years</td>
<td>87%</td>
<td></td>
</tr>
<tr>
<td>30-49 years</td>
<td>76%</td>
<td></td>
</tr>
<tr>
<td>50-64 years</td>
<td>66%</td>
<td></td>
</tr>
<tr>
<td>65+ years</td>
<td>49%</td>
<td></td>
</tr>
</tbody>
</table>

Source: DR Panel
ity of TV/Internet multitaskers, they use the Internet regularly when watching TV alone, while under a third do it to the same degree when watching TV with others. The results may indicate that there are still strong conventions surrounding watching TV in a social setting, and many perceive it as somewhat inappropriate when the person he/she is sharing a sofa with switches on the computer while the couples on Dancing with the Stars are waltzing their hearts out. The study conducted by the DR Panel shows that although the trend is consistent across age groups, it is the younger TV-viewers who most frequently surf the Internet while watching TV.

Battling for attention
The media offerings find themselves battling for the TV viewer’s attention when large parts of the audience have an interactive device turned on while Paradise Hotel or Hammerslag (a Danish TV-show about real estate) roll across the screen. Traditionally, television is a flow media where the viewers sit back in their chairs to be informed or entertained, whereas the Internet requires our concentration and active choice to a higher degree.

American researchers from Boston College have in a recent study with defined test situations concluded that media multitaskers on average shift their attention between the Internet and the TV every 14 seconds when using both types of media. At the same time, they estimated that the computer took up 68% of the time.

DR Audience Research’s study supports these conclusions. When asked what TV-viewers focused on the last time they watched TV and surfed the Internet at the same time, 45% answered that they concentrated primarily on the Internet, while 19% estimated that they focused primarily on the TV. Other studies show the same trend. In Norway NRK found that 43% of the Norwegians concentrated primarily on the Internet the last time they used both media simultaneously and the American research institute Nielsen has published similar results in the US.

Media multitasking opens up for new possibilities
Does this mean that TV’s heyday is now over and its days as an audience mesmerizer are now done? Nothing suggests that, as media multitasking is more versatile than that. DR Audience Research’s study shows that we are most often online while watching the news, sport or entertainment. When we watch documentary programs, series and movies on TV we are less prone to use the Internet. This indicates that some genres are better at maintaining the viewers’ attention than others.
This opens up for new ways of thinking TV content, particularly in the genres where the viewers are more prone to be online at the same time. The research that DR Audience Research has conducted through the DR Panel and other corresponding studies shows that the Internet use, in its present form, has nothing to do with the programs that are shown on TV. When we are online while watching TV, our time is usually spent on surfing the web, Facebook or checking emails. And even more research is required to answer the question of whether this is because TV programs rarely encourage cross media use, or if TV-viewers are just fundamentally indifferent to cross mediality. Regardless, this poses new challenges for advertisers and program producers, such as whether advertising campaigns should be put together in new ways, should TV productions be background noise or maybe the Internet’s possibilities can be integrated as an element in the TV programs.

The development will continue
The technological development and distribution of smartphones and tablet computers with access to the Internet suggests that TV viewing and Internet use will continue to overlap even more than they do now. Much like the computer, the new Internet media provides easy access to surfing the Internet and online services, but they are even more ubiquitous than laptops and most people have them at hand when they aren't home. And perhaps, more importantly, smartphones and tablet computers are more discrete than traditional computers, which still dominate the Internet use today. These new Internet devices even allow for interactivity, partly because a cell phone is able to react to audio signals that are fed into the TV broadcast’s soundtrack. This could fuse TV viewing and Internet use even more. At the same time, TV sets with integrated Internet, the so-called smart TVs, are penetrating the market even more, and if they have their big breakthrough, viewers will find it even more natural and accessible to go online while watching TV.

About the study
The article is based on two studies conducted by DR Audience Research. In part a telephone interview survey conducted with Megafon in October/November 2011 in a representative segment of Danes over 15 years where 1,057 respondents participated. And in part a study in the DR Panel in June/July 2011 where 4,077 panelists participated. The DR Panel is not representative for the general Danish population, as the panelists have signed up for participation.

What is media multitasking?
Media multitasking is a relatively new term. It covers the use of several types of media simultaneously and has become particularly relevant with the advent of new digital media. It is difficult to examine because it crosses several platforms and as such traditional methods of measurement.
TV news watching per day in 2006–2007 and 2010–2011

Age group: 3+ years
Source: TNS Gallup TV-Meter

16 min.  
2006–2007

20 min.  
2010–2011
Breaking News: TV 2 News turns 5

When TV 2 launched the first Danish 24-hour news channel in December 2006, the reactions were palpable. Is an entire channel dedicated solely to the news really necessary? Does a small and peaceful country like Denmark even have enough news to fill an entire day with news stories? Let’s take stock of the situation after 5 years with TV 2 News.

By Niels Marslev
DR Audience Research
After TV 2 News’ five-year birthday in 2011, it is no longer an issue as to whether the channel should exist. TV 2 News is now the seventh largest TV channel in Denmark with an audience share of 3.5% in 2011, which is just 1.1 points less than TV 3, the third largest channel in Denmark. During the week, 1.6 million Danes (30%) watch TV 2 News for at least two consecutive minutes. Based on a report from EBU, we can conclude that in terms of viewers, the channel is among the most successful of its kind in Europe.

To top this off, the channel is a definite financial success for the TV 2 family, primarily due to solid distribution and a high settlement price with most TV distributors. The channel also has commercial partnerships with select advertisers, but it is not dependent on this funding to provide a financial contribution to the group. TV 2’s niche based channels yielded a total profit of DKK 171 million in the first half of 2011.

**Breaking News: TV 2 News has found its format**

A 24-hour news channel can be constructed in many different ways, and TV 2 News has also seen many changes in its five years. From its beginnings on 1 December 2006, News has been characterized by a short 15-minute news loop with regular updates. A number of magazine formats were added to the line-up. One of them is quite simple, Mogensen & Kristiansen (a political debate show), which is still to be found in the schedule, while others have been added. Today the news blocks are much longer and the duration is quite flexible, making TV 2 News the channel where politicians, experts and others can enjoy much more airtime than in the tightly scheduled news programs on the main channels. This has all been done without squandering News’ strong brand position as the channel which is first with the latest news stories.

The news segment is still the audience magnet in terms of viewers. However, whereas the news on TV 2 News had an audience share of 3.6% in 2011, the magazine formats are actually not that far behind with 3.1%. And because the magazines are shown again and again it can be difficult to compare their ratings directly. When Mogensen & Kristiansen are on air live on Fridays at 6.30 p.m., the ex-spin doctors are only watched by approximately 22,000 viewers on average, but on Sunday mornings when the rerun hits the screen, 58,000 viewers tune in. Sunday mornings are primetime for TV 2 News. This is also when Presselogen (journalistic debate program) boasts more than 60,000 viewers.

The latest addition, Kulturen på News (a magazine format focusing on culture), brings down the ratings results. Hostess

---

**Audience ratings for regular magazine programs on TV 2 News in 2011**

<table>
<thead>
<tr>
<th>Magazine Format</th>
<th>Schedule</th>
<th>Viewers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mogensen &amp; Kristiansen</td>
<td>First time, Friday 6.30 p.m.</td>
<td>22,000</td>
</tr>
<tr>
<td></td>
<td>Second time, Friday 9.30 p.m.</td>
<td>29,000</td>
</tr>
<tr>
<td></td>
<td>Third time, Saturday 11.30 a.m.</td>
<td>32,000</td>
</tr>
<tr>
<td></td>
<td>Fourth time, Saturday 2.30 p.m.</td>
<td>35,000</td>
</tr>
<tr>
<td></td>
<td>Fifth time, Saturday 10.30 p.m.</td>
<td>26,000</td>
</tr>
<tr>
<td></td>
<td>Sixth time, Sunday 2.30 p.m.</td>
<td>24,000</td>
</tr>
<tr>
<td></td>
<td>Seventh time, Sunday 2.30 p.m.</td>
<td>58,000</td>
</tr>
<tr>
<td></td>
<td>Eighth time, Sunday 8.30 p.m.</td>
<td>22,000</td>
</tr>
<tr>
<td>Eilemann/Lykketoft</td>
<td>First time, Friday 10.30 p.m.</td>
<td>23,000</td>
</tr>
<tr>
<td></td>
<td>Second time, Saturday 9.30 a.m.</td>
<td>47,000</td>
</tr>
<tr>
<td></td>
<td>Third time, Saturday 3.30 p.m.</td>
<td>20,000</td>
</tr>
<tr>
<td></td>
<td>Fourth time, Saturday 9.30 p.m.</td>
<td>21,000</td>
</tr>
<tr>
<td></td>
<td>Fifth time, Sunday 11.30 a.m.</td>
<td>35,000</td>
</tr>
<tr>
<td></td>
<td>Sixth time, Sunday 3.30 p.m.</td>
<td>20,000</td>
</tr>
<tr>
<td></td>
<td>Seventh time, Sunday 10.30 p.m.</td>
<td>26,000</td>
</tr>
<tr>
<td>Presselogen</td>
<td>First time, Sunday 10.00 a.m.</td>
<td>63,000</td>
</tr>
<tr>
<td></td>
<td>Second time, Sunday 1 p.m.</td>
<td>34,000</td>
</tr>
<tr>
<td></td>
<td>Third time, Sunday 9 p.m.</td>
<td>25,000</td>
</tr>
<tr>
<td>Tirsdagsanalyen</td>
<td>First time, Tuesday 8 p.m. (Jan – Oct)</td>
<td>43,000</td>
</tr>
<tr>
<td></td>
<td>First time, Tuesday 6 p.m. (Oct – Dec)</td>
<td>53,000</td>
</tr>
<tr>
<td></td>
<td>Tuesday 9 p.m. (Oct – Dec)</td>
<td>26,000</td>
</tr>
<tr>
<td></td>
<td>Tuesday 12 p.m.</td>
<td>32,000</td>
</tr>
</tbody>
</table>
Stéphanie Surrugue’s daily show from Mondays to Thursdays at 8 p.m. has on average only had 15,000 viewers per show since its premiere in October.

**Breaking news: DRs shot at non-stop news**
Already in the summer of 2007, DR opened the doors to its own news channel, DR Update, which differentiated itself from TV 2 News by being designed for the Internet. Only a few were able to pick up the channel on the TV to begin with. It quickly became apparent that even though DR Update had a modest channel penetration, a much larger client base was able to find them online. Since then Update’s distribution has grown hastily and today approximately as many Danes are able to watch DR Update as TV 2 News. The figures are, according to TNS Gallup’s annual survey, two out of three households.

DR Update suffered the first years as a television product due to its online format. And DR Update’s TV quality was not on par with News until it was relaunched with a new studio and on air look in early 2011.

While News has moved in another direction, Update has in many ways stayed true to its original format with short news loops.

**Breaking news: DR Update and TV 2 News have the same viewer profiles**
46% of the Danish households with television sets are able to watch both news channels, 21% only receive TV 2 News while 21% only receive DR Update. The households that have access to both channels indicate, not surprisingly, that the larger of the two channels, TV 2 News, had a hold of most viewers with a weekly coverage of 43% compared to DR Update’s 29%.

Early January 2012 saw changes in the reception of the digital terrestrial television, because TV 2 became a commercial broadcaster, and the old MPEG2 format is replaced by the MPEG4 format. More Danes are expected to have access to the Danish news channels because of this change, particularly because DR Update is already broadcast in the MPEG4 format, and will therefore achieve higher penetration. Today, approximately 12% of Danish households do not have access to one of the two news channels. Because of the differences in the ways the Danes receive their television signals, TV 2 News is the most widely distributed in the capital area where many people have access to cable TV while DR Update is most widespread to the west of the Great Belt because the channel is readily available through the terrestrial net.

In spite of the differences in the content of the channels and the distribution patterns, their viewer profiles are amazingly similar. Generally speaking, the viewers are found especially in...
the mature end of the scales. In their first year, the news channels had a distinctively younger viewer profile than the news on the main channels. However, the subsequent growth in the channels has primarily come from older viewers, making the news channels today among the Danish channels with the highest average age. Compared with the main channels’ primary news programs, the news channels’ viewer profiles are still a bit younger.

Both news channels, and TV 2 News in particular, have a stronger hold on the male viewers than the female viewers as opposed to TV Avisen (DR1’s news program) and Nyhederne (TV 2’s news program), which both have a few more female viewers. DR Update has relatively speaking the largest viewer share west of the Great Belt and TV 2 News does relatively speaking better in Copenhagen.

**Breaking news: Danes watch more news today than in the past**

While the average Dane watched 16 minutes of TV news per day in 2006-07, TV news viewing has increased to approximately 20 minutes in 2010-11. This is an increase of almost a third. In the same period however, total TV viewing also increased by approximately a third. So, TV news viewing approximately constitutes the same share of the Danes’ TV viewing today as 4-5 years ago, that is 14%. There is hardly any doubt that the news’ share of the total TV viewing would have been significantly lower if the news channels had not compensated for the lower viewing figures on the main channels’ established news programs.

### Viewer profiles for the news on Danish TV

Percentage of the age group’s viewing, January - November 2011. Source: TNS Gallup TV-Meter

<table>
<thead>
<tr>
<th></th>
<th>3-20 years</th>
<th>21-40 years</th>
<th>41-60 years</th>
<th>61+ years</th>
</tr>
</thead>
<tbody>
<tr>
<td>DR Update</td>
<td>9%</td>
<td>36%</td>
<td>42%</td>
<td>5%</td>
</tr>
<tr>
<td>TV 2 News</td>
<td>3%</td>
<td>37%</td>
<td>43%</td>
<td>9%</td>
</tr>
<tr>
<td>TVA 18.30</td>
<td>5%</td>
<td>30%</td>
<td>55%</td>
<td>10%</td>
</tr>
<tr>
<td>TVA 21.00</td>
<td>6%</td>
<td>35%</td>
<td>44%</td>
<td>9%</td>
</tr>
<tr>
<td>TV 2 Nyhederne 19.00</td>
<td>5%</td>
<td>32%</td>
<td>47%</td>
<td>8%</td>
</tr>
<tr>
<td>TV 2 Nyhederne 22.00</td>
<td>5%</td>
<td>35%</td>
<td>38%</td>
<td>12%</td>
</tr>
</tbody>
</table>
Is there more than one type of TV experience?

What impact does it have on the whole TV experience that we are now able to start TV programs over, watch them when we want to and we are able to watch ahead?

DR Audience Research has listened to members of the DR Panel and their stories of experiencing TV in new ways.

By Lene Heiselberg and Sofie Scheutz
DR Audience Research
To be clear, Flow TV is still the most widespread way of watching TV. When DR showed the last episode of the second season of Borgen (Danish TV series) on DR1 and DRHD in 2011, the total audience rating was 1,563,000. In comparison, the audience rating for the time shifting TV viewing was 76,000 the first two weeks after the season finale, while the audience rating online reached 72,000 including the sneak preview. Large successful series still gather quite a few Danes in front of their TVs and the levels for time-shifted viewing on TV and online are now so high that it also makes a difference for many Danes’ TV experiences.

New services that give the Danes the opportunity to watch TV, series and movies when they want to are popping up everywhere. The supply of Internet TV has increased significantly lately with services like DR NU, TV 2 Sputnik, NUTV from SBS and Viaplay from Viaplat. The users are able to watch many of the programs from the Danish TV stations when they want to and often catch a sneak preview before the show is aired on TV. The old VHS recorders are practically extinct and have been replaced by hard disc recorders, which record in a much higher quality and give the opportunity for so-called time-shifting, where it is possible to pause the show and start it again when dinner is finished or the phone call from the in-laws is done. It is possible to pause the show for so-called time-shifting, where recording can be done.

New ways of watching TV open up for an interesting question: What impact will it have on the television experience if you no longer have to sit in front of the TV as a slave to the evening’s regularly scheduled TV programs? Via the DR Panel, DR Audience Research has asked users of the new offers to describe their experiences, habits and needs for watching TV independent of time and place.

“I have a life and I don’t always know what I will be doing Sunday evenings at 8 p.m. That’s why.” The study shows that participants from the DR Panel are only just becoming acquainted with the possibilities of watching TV independent of time and place. But those who are familiar with the possibilities explain that they enjoy the flexibility that lies in not having to plan according to the TV stations’ scheduled programming. They also share that they are happy to be able to watch niche programs and are able to watch the series they previously missed out on because the whole family was not interested in watching them. Many participants in the study highlight that they often turn on the TV when they are bored or alone. Most often they will turn on the TV and watch what is being sent at that time, but now more people are choosing what they want to watch – and when they want to watch it. One of the panelists states “I can always find something to watch on the TV, on Bonanza, on DR NU or somewhere else”.

“I simply have more time after the kids have been put to bed.” When the Danes have the opportunity to watch TV independent of time and place, they are able to maintain their everyday lives at the same time. They choose to make time for their social life, hobbies and family instead of being bound by regularly scheduled programming. Most children have not gone to bed before the Danish TV dramas start, so time-shifting may even provide increased harmony in families across Denmark. There is no reason to panic, because there is still plenty of time to get your daily fix of television.

Smart, efficient and family-friendly, but with no real sense of being together
When the participants in the study describe their experiences of watching TV independent of time and place, they highlight the practical aspect. Words such as efficient, modern, useable, family-friendly, and last but not least, smart prevail. “This means that I don’t need to hurry up and sit down in front of the TV according to deadlines for when a program is about to start”, a participant shares.

On the other hand, few participants describe their experiences as a spirited and dedicated sense of togetherness. So, they don’t feel that they have a sense of togetherness, which they may have felt with a traditional TV experience. The participants in the study do not choose words like lonely or not being social, indicating that they do not have any problems with not being part of the TV-watching community. Because when all is said and done, the paramount motive for use is convenience: You can pause the program when you are disrupted, you can start over if you switch on the TV too late, and you can go to the archives when you want to choose exactly what you want to watch.

“Some programs must be watched live.” When we asked the participants in the study what type of TV they want to watch independent of time and place, almost all the participants mentioned shows that they are extremely interested in, such as Mythbusters, Troldepejet (Danish children’s program) and So Ein Ding (TV show about gadgets and technology). Many also mention their favorite programs, which they can always catch up on if they are lagging behind such as e.g. Fristet (Danish reality show), Spise med Price (cooking show) or TVITVITV (program about TV). On the other hand, it is difficult for the participants to imagine being just a few minutes behind while watching a soccer match or the X Factor finale show. Sports and live events

The Development of Media 2011
Chapter 7 page 40
In the study to define what is a TV experience, we also asked the participants what having a TV experience means to them.

Considering that TV content is quickly outdated, viewers also experience losing out on the sense of togetherness or community if they are behind by one episode. This has nothing to do with a TV experience, as the participants do not feel that the content is quickly outdated when they watch TV programs.

When people watch TV programs, we cannot precisely express the behavior. For example, when people watch TV programs dependent of time and place as a supplement to the traditional TV viewing, we can experience it together. In time it will probably be less important to sit in front of the TV.

Watching TV give the media users more freedom of choice. It is difficult to guess whether the phenomenon will grow among the users, but the possibilities for using TV programs independent of time and place as a supplement to the traditional TV viewing is definitely increasing. A growing social trend is individualization and the new ways of watching TV give the media users more freedom of choice.

In the coming generations, the old-fashioned flow TV is ready for retirement, but it is likely that TV viewers will begin to supplement their traditional TV viewing even more with content, which is created for broadcast TV. In line with this, we see an increased need for a more varied vocabulary and ways of defining what the modern TV experience actually is.

Therefore, it doesn’t make sense to watch old news programs. Many of the participants also mention television drama series. They do not want to risk accidentally hearing at work who the murderer is, if they are behind by one episode.

Aside from all of this, is the joy of anticipation important to people? "I always end up watching the upcoming shows and then I lose the joy of anticipation waiting for the next episode", one of the participants states. Viewers also experience losing out on the sense of togetherness or community if they watch a new episode of a drama series on the computer, which hasn’t yet been shown on TV. This also applies to sneak previews: "Unfortunately, I happened upon a new episode of Borgen. But then on Sunday evening I just sat in front of the computer and watched the next episode on the computer while everyone else was watching the episode on TV. A little crazy, but then at least I am part of the atmosphere surrounding Borgen", another participant shares.

"No, YouTube has absolutely nothing to do with a TV experience." We also asked the participants in the study to define what is not a TV experience. The top scorer for the definition of a TV experience is, not surprisingly, defined as a TV program shown live on TV. The second place goes to the experience of watching a TV program, which is time-shifted or to catch up on a program by watching it online. Preferably for free e.g. DR NU.

At the other end of the scale for whether something can be classified as a TV experience or not, the majority answers "no" to programs that can be watched on tablets or cell phones. The same is true for movies that are rented online or for YouTube content. The majority of the participants do not feel that this has anything to do with a TV experience.

"Delayed live..? Is there a word missing" The background for this article is to portray the possibilities of watching TV independent of time and place and to examine what a new TV experience in reality is. Is a TV experience always linked to sitting in a sofa and watching whatever is on TV? And is that TV experience different from watching an episode of Borgen on a smartphone? Yes, it definitely is. But how? And is it even regarded as a TV experience when we watch TV on our smartphones?

We don't have the vocabulary to precisely express the behavior when people watch TV programs in new ways. This challenge is not ours alone. Participants in the study were also challenged and had a difficult time expressing the phenomenon. One of the participants had to explain e.g. what is a real TV program and ended up by saying "it is live programs, no what I mean is… it is what I watch when the programs are aired on the TV."

"In time it will probably be less important to sit in front of the TV." The coming generations may have a good laugh at the thought of everyone sitting in front of the TV at the same time Sunday evenings, and maybe they will think that it was a bit boring that everyone watched the same thing. When we read Harry Potter books, listen to Medina (Danish musician) or watch Inception at the movies, we are able to share our experiences with each other afterwards without having experienced it together.

The study is conducted through a survey in the DR Panel with inspiration from the qualitative research. Explorative and open questions have been used primarily. 30 respondents in total have participated in the survey, and all of the respondents are people who use TV content independent of time and media. An equal amount of men and women aged 19 to 85 years old have participated.
Facebook’s distribution among Danish Internet users
Average percentage of Danish Internet users who have visited Facebook monthly from January to October 2011.
Age group: 15+ years, Danish Internet users
Source: FDM / Gemius

30% Have not visited Facebook
70% Have visited Facebook
Facebook is an everyday tool

Online social networks are not a new phenomenon. They have existed for a long time, but it was not until Facebook came to Denmark that the Danes became part of a social network for real – and they all chose the same network. The network has become an everyday tool where we cultivate our relationships and where we access content on other web sites. So, instead of being just a web site, Facebook has to some degree become an infrastructure for our use of the Internet.
2.7 million Danes spend an average of 20 minutes per day on Facebook. This equals 18% of the total time spent on the Internet. Facebook is not just a web site that people visit from their PCs. Many of the users carry Facebook in their pockets throughout the day and almost a quarter of all users log onto Facebook from their cell phones every day. The great amount of time spent and the increased access to Facebook in the small breaks during the day means that the service in many ways has become a part of the Danes’ infrastructure when they surf the net. Facebook is for many users a point of departure, which also opens up the Internet and is closely connected with other web sites and services.

The one-hit wonder grew up
Facebook hit the one million-user mark in Denmark back in 2008, and at that time it was unheard of that an online social network could grow so massively and attract such a wide range of users. Until then, phenomena like MySpace and Arto (social network for young people) had reached a large number of users, but mostly it was the younger segment that used them.

Since 2008, Facebook has grown even more among the Danish Internet users, MySpace and Arto have practically been forgotten and even though the increase of users has subsided, it is impossible to neglect the stability shown by Facebook. Looking at the user statistics, there is nothing to indicate that the service has lost momentum, as foreseen by some – and this is also apparent when Facebook users are asked.

A study conducted by DR Audience Research through the DR Panel has shown that 23% of Facebook users spend as much time on Facebook now as when they started using the network, while an astonishing 48% feel that they spend even more time. If we factor into this that almost all the Facebook users in the DR Panel have had a Facebook profile for more than a year, and therefore have had more than enough time to tire of Facebook, this shows that the service has been able to hold on to its users to a large degree. This is emphasized by the 43% of Facebook users in the study who agree that they would not like to do without Facebook in their everyday lives, just as 45% feel that they spend more time online after they have joined Facebook.

Contact and the close relations
What is it about Facebook that makes the Danes return day after day? The study from the DR Panel indicates that one of the major focal points is the ability to stay in contact with family, friends and old acquaintances. It is particularly striking how important contact with close relations is. When asked what the service means to them in their daily lives, most answer that contact with friends and family is very important to them. On average, the participants estimate that close friends and family members make up a total of 40% of their Facebook contacts.

All things considered, a lot of things are made easier by using social networks, because an important dimension of Facebook is also the ability to keep up with friends and acquaintances, remembering birthdays and other events and making arrangements to meet up. Facebook can therefore be considered an everyday tool.

Passing time is an important motivating force for Facebook users and more than 50% answer that they often just surf around when they are logged on to Facebook. It is in many ways a modern town hall with talk, meetings, discussions, a few games etc. – the only thing missing is a cup of coffee. Several participants in the study also compare Facebook with the traditional chat with a neighbor across the fence.

Facebook is also in large part about keeping updated on your surroundings, and in much the same way as with other social networks, a lot more time is spent using content than creating it. The most popular activities among the users are checking out Facebook friends’ pictures and profiles, commenting and “liking” other peoples’ status updates – while updating their own is rare.

Facebook’s news criteria
Facebook is also used for other purposes than just reading status updates and checking out pictures. Users have found a simple way of sharing news stories. The study in the DR Panel has shown that young users in particular publish news stories on their profiles and read news stories shared by their friends, but the phenomenon is not limited to this segment of the population. Actually, almost half of the participants indicate that they often read news articles that their friends have shared, and approximately 25% state that they often share news stories themselves. In this way, a news article is disseminated to other Facebook users who may not have seen the story. The article may include a comment or a like from a friend and therefore become an even more interesting read.

Even though Facebook has a different function than the news only sites, the network plays a part for many of the users’ news consumption. DR Audience Research has asked the users to describe the news supply on Facebook compared to other news offers using a range of different words, and the words that the majority associate with the news on Facebook are “entertaining”, “young”, “fun”, “fast” and “open”. This is where the social network...
differentiates itself from the traditional news sources, which to a lesser degree are associated with these words. In the greater picture, this indicates that the news which is shared on Facebook is made up of the part of the news supply where the news are curious, fun or driven by a special interest.

The Parliament has moved into Facebook

Typically a news story is posted to express an opinion and an article can often be a point of departure to discuss the news story. Since the early days of Facebook, it has been discussed whether net based debates suffer too much because of anonymous online posts, but debates arising from Facebook posts do not suffer to the same extent, because users share their pictures and names and know that their social circle also can read their posts.

The role of the Internet has also been foreseen as a way of connecting politicians and citizens in new ways. Through the years, experiments with chat forums, blogs, etc. have been initiated, but Facebook makes it possible to follow the politicians’ work in the Parliament in new ways and to have debates with them. This creates new possibilities of keeping up-to-date with what is going on in the Parliament without having to watch the Folketingskanalen (a channel with live transmissions from the Parliament) all day long. This supports a supplementary study that DR Audience Research has conducted in the DR Panel in connection with the election in 2011. Among the respondents who used social media, including Facebook, to follow the election, 29% indicated that they acquired information on the individual candidates’ stance on Facebook.

During the national election we also saw how secrecy surrounding who votes for who was almost abolished. Facebook users quickly became friends and fans of politicians on Facebook and many placed pic badges on their profile pictures to sympathize with parties and participated in lively discussions. Also, the younger segment without voting privileges expressed their democratic voice, and to exemplify democratic voice, one night over 20,000 users changed their profile picture to a picture of Søren Pind (Danish politician) to express their opinion regarding one of his statements.

Befriending and becoming fans of politicians is interesting in more than one way, as it shows how Facebook has become an infrastructure. Fans follow and debate issues with politicians on Facebook instead of on the politicians’ own web sites. And all things considered, being friends with a politician on Facebook gives a sense of being a bit closer to the politicians than with those politicians who only have a
Facebook defectors are few and far between
As mentioned in the beginning of this article, Facebook has held on to its impressive user figures so far. Overall, Facebook’s Danish user figures have never been larger than in 2011, but there are of course users that have left the network while others have joined. In the DR Panel’s study, 29% of Facebook users estimate that they now spend less time on the network than previously. So we are talking of a user group who is possibly losing interest in the network. At the same time, an additional 13% state that they have used Facebook in the past, but do not use it any more. They indicate that there is no need for a service like Facebook, that the information available on Facebook is not relevant or that they would rather use other forms of contact.

Other explanations are related to privacy. Either people do not want to share their private information with Facebook and are insecure as to the data privacy, or they do not want to put their private life on display for other users. Facebook has been criticized in the media for the way it handles data and even though only few have left Facebook so far, this has cost them users. Facebook’s challenge lies in the crossfield between staying relevant to the users and respecting the user’s wish for privacy.

Social networks give the Internet an extra dimension
Facebook gives us a digital infrastructure of our social relations. This digital infrastructure is about structuring your social associations, systematizing them by communicating, organizing and sharing. But Facebook is also about emotions. It is a place where we can see pictures of our friends’ lives, share thoughts and good as well as bad experiences. Facebook helps to meet needs for socializing and being part of a group. Several have attempted to write Facebook’s obituary these past years, but nothing indicates that Facebook will be leaving the Danes’ screens any time soon.

In Denmark, Facebook is the dominating social network. In other countries you see that social networks like e.g. Twitter also are rather large. Twitter offers some of the same functionalities as Facebook, but focuses on small, short status updates. Google has also launched their answer to a social network, Google +, which so far is not used to the same extent as Facebook.

About the study
The article is based on a number of studies in the DR Panel, which DR Audience Research has conducted in the second half of 2011. The DR Panel is not representative for the Danish population in general, as the participants have joined the panel on their own.
Data sources

Statistics Denmark
DRBB’s (Danish Advertising and Relation Bureau’s Trade Association’s) Media index
Dansk Oplagskontrol: Det Danske Reklame-emarked – Annonceomsætningen 1. halvår 2011
Dansk oplagskontrol: Reklameforbrugsundersøgelsen 2010
FDIM
Gemius Denmark
Megafon
TNS Gallup Annual Survey
TNS Gallup Index Danmark
TNS Gallup Radio Meter
TNS Gallup Trendanalyse
TNS Gallup TV Meter
TNS Gallup Mobile Devices 2011

Other sources

NRK (Norwegian Broadcasting Corporation)
Mediawatch.dk
Swedish Radio

The Nielsen Company’s blog: blog.nielsen.com

Screen Digest

DR Panel
Data in this publication also stems from studies conducted in DR’s own Internet panel, the DR Panel. The DR Panel uses DR to continuously study the Danes’ media habits and perception of media content. Anyone who is over the age of 15 and living in Denmark can be part of the DR Panel. You can join the DR Panel and read more about it on dr.dk/drpanelet

Contact information

DR Medieforskning@dr.dk
DR Medieforskning, DR Byen
0999 København C

More on the net

The development of media 2011 is available at www.dr.dk/publikationer
English version is available at www.dr.dk/aboutdr
The material may be quoted with a clear reference to the source

Graphic design and photos

DR Design

Cartoon illustrations
Christian Wichmann

Tryk
Hertz Bogtrykkeri
Surfing the Internet is just a small part of what we can use the Internet for now. The Internet is a distribution channel and an independent media with its own content. This duality will become more important in the future, as the Internet is becoming a part of even more devices. The large TV producers are already competing to manufacture the best "smart TV", a TV with online access in the same way as smartphones. The Internet has become a part of cell phones and this combined with microphones, cameras, video cameras and GPS has made the smartphone an extremely advanced media center that keeps its owner updated with information and enables her to share her geographic location, pictures and videos with friends.

New and constant technological innovations are slowly liberating the Internet from a plug in the wall where it is connected to a stationary computer, and they will impact the development of various devices in the years to come by making the content accessible in new ways. Today, a picture taken of the view from our hotel room with a smartphone can be shared with our family's computers in seconds. A movie, which is rented through TV can be watched on the tablet computer etc. Content can move in new ways between the media devices, because the Internet connects all these devices.

Dr Audience Research has used its crystal ball to look a few years into the future and has met Sofie Petersen, who is a 36-year old Danish woman. She uses technology because it makes her days easier. The specific services that she uses in the story do not all exist today, but the technology behind them does.

By Carsten Andreasen, DR Audience Research / Storyboard DR design / illustrations Christian Wichmann
06:57 A.M. 

**SOFIE PETERSEN HAS A MEETING WITH HER INDIAN BOSS**

My meeting with Panav Vasu starts in 3 minutes. I might just make it.

TRANSLATION

Automatic translation is found among others in Google's service, Google Translate, which now works so well that texts, which are translated from Hindi to Danish are readable.

Google's browser automatically translates pages from foreign languages into Danish and it also translates emails automatically. The video service YouTube is also able to translate now. The computer understands what is being said in e.g. a lecture and then translates the subtitles automatically into Danish.

THIS PROJECT WILL HAVE A GOOD START WITH THESE INVESTORS.

This project will have a good start with these investors.

YOU ARE TOTALLY RIGHT

You are totally right.

06:57 a.m.

My meeting with Panav Vasu starts in 3 minutes. I might just make it.

Sofie Petersen has a meeting with her Indian boss.

You are totally right.

This project will have a good start with these investors.

**TRANSLATION**

Automatic translation is found among others in Google's service, Google Translate, which now works so well that texts, which are translated from Hindi to Danish are readable. Google's browser automatically translates pages from foreign languages into Danish and it also translates emails automatically. The video service YouTube is also able to translate now. The computer understands what is being said in e.g. a lecture and then translates the subtitles automatically into Danish.
Apple has launched the first example of speech recognition with its function, Siri, where the computer is able to understand what is being said and to put it into a broader context. As an example, the user can ask the phone to:

"Wake me up at 9 a.m."
"Send a text message to my mother. I am ten minutes late"
"How is the weather?"

Cloud computing is a term that covers a number of services where data is saved on central computers and is therefore accessible everywhere.

Many have already tried webmail such as Hotmail or Gmail, but in the future we will also be able to access our music, recorded TV programs, electronic books and work documents from all of our devices.

The English Screen Digest expects that every household will have eight devices that can access these services in 2015.
An accident on the highway! I should probably take the train home.

Digital Assistants

The phones in the future will be able to keep up with its users’ habits and provide them with the information they need through apps, which are small programs for the phone. For example, if the user takes the train every Thursday, the app will automatically be able to inform of delays. The app will also be able to do a lot of other things, e.g. keep an eye on what kind of music the user listens to and inform of any upcoming concerts with the artists.

Outside the supermarket the phone beeps

If I check in here, I get a discount on the milk. Wonderful!

The Digital Meets the Physical

A lot of modern electronic devices have built in GPS, and therefore knowledge of where the device is located. This means that the phone can immediately provide the user with special offers at the user’s exact location in the same way that the user can check in via different services such as Foursquare to let friends know where he is.

A digital camera can also register exactly where a photo is taken and e.g. show all the photos on a map of Denmark.
TV flies the nest

Electronic program guides can easily inform what is on TV. Modern TVs and set top boxes only require one click to record a program. Even if you are on the train, the video can be programmed simply and easily through the phone. It is possible to watch the recorded programs on the phone when you are on the go with most modern devices.

Modern phones and tablets, like Apple's iPad, for example, can easily access work documents regardless of where you are. Whether you are on the bus, in the summerhouse or at a birthday party.

Sofie reads the TV schedule in the train...

...and watches the news on her phone...

This looks really exciting. I think I'll record it for later.

...and now let's hear from our reporter who is on the spot.

I just had an idea for the project papers. I should probably write it down immediately.

04:21 p.m.

04:34 p.m.
CONTENT MOVES AWAY FROM HOME

FUNCTIONS SUCH AS AIRPLAY ENSURES THAT CONTENT NO LONGER HAS TO BE BOUND TO ONE DEVICE, BUT INSTEAD IT CAN EASILY BE SHOWN ON ANOTHER SCREEN CLOSE TO THE DEVICE. THIS, IN COMBINATION WITH CLOUD COMPUTING, MAKES IT POSSIBLE TO TAKE A MOVIE THAT WAS RECORDED AT HOME AND SHOW IT ON A FRIEND'S TV WITH RELATIVE EASE.

THE DIGITAL HOME

WITH ADVANCED SET TOP BOXES IN THE HOME IT IS POSSIBLE TO COLLECT THE HOUSEHOLD’S DIGITAL MEDIA AND SHOW THEM ALL OVER THE HOUSE. TV PROGRAMS THAT HAVE BEEN RECORDED CAN BE SEEN IN ALL ROOMS, AND THE MUSIC IS ALL COLLECTED IN ONE PLACE AND CAN EASILY BE LISTENED TO WHEREEVER YOU ARE IN THE HOUSE. IT IS EVEN POSSIBLE TO PROGRAM IT SO THAT IT AUTOMATICALLY FOLLOWS A PERSON AROUND THE HOUSE, PLAYING MUSIC FROM THE CLOSEST SPEAKERS.

When Sofie comes home...

Look at what I recorded at soccer, Mom.

Wow, that’s a great goal!

Our team scored it!

Content moves away from home

Functions such as Airplay ensures that content no longer has to be bound to one device, but instead it can easily be shown on another screen close to the device. This, in combination with cloud computing, makes it possible to take a movie that was recorded at home and show it on a friend’s TV with relative ease.

The digital home

With advanced set top boxes in the home it is possible to collect the household’s digital media and show them all over the house. TV programs that have been recorded can be seen in all rooms, and the music is all collected in one place and can easily be listened to wherever you are in the house. It is even possible to program it so that it automatically follows a person around the house, playing music from the closest speakers.

Our team scored it!

Whee, I’m tired.

Phew, I’m tired. Should we finish watching the movie tomorrow?

Let’s watch it in the bedroom.

I will get the movie started.

Wow, that’s a great goal!

Our team scored it!

Content moves away from home

Functions such as Airplay ensures that content no longer has to be bound to one device, but instead it can easily be shown on another screen close to the device. This, in combination with cloud computing, makes it possible to take a movie that was recorded at home and show it on a friend’s TV with relative ease.

The digital home

With advanced set top boxes in the home it is possible to collect the household’s digital media and show them all over the house. TV programs that have been recorded can be seen in all rooms, and the music is all collected in one place and can easily be listened to wherever you are in the house. It is even possible to program it so that it automatically follows a person around the house, playing music from the closest speakers.
We hope that this peak into Sofie Petersen's day has inspired you to consider the new technology and its significance. Not just in terms of how it affects media and companies, but also its importance for our society and us as people. The story has only chosen a few examples of technology that change the way we think, work, feel and act. In the coming years, technology will continuously change our workplaces, privacy, welfare and daily life with electronic health records, household robots, digital administration, augmented reality, international media giants and lots and lots of screens.

We know that our imagination and knowledge are hardly enough to foresee the future. A good rule of thumb is that change will come around slower than we think, but will be much more radical when it happens.

THE END