Media Trends
in the Nordic Countries

Newsletter from NORDICOM

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Radio listening in the Nordic countries 2015

Radio | Nordic March 2016 | EH

Radio listening is stable in the Nordic region. Some 70-75 per cent of northerners still listen to the radio on the average day, with older people listening more than younger people and public service radio accounting for the largest share of listening. These are some of the results from the official 2015 radio measurements in the Nordic countries.

The national survey institutes have published their radio reports for 2015. Even though differences in methods over the years and between countries make comparisons difficult, there are some visible patterns.

Cease of a downward trend
After several years of downward listening trends, the watchword of the 2015 radio reports is stability, in both reach and listening time. The main difference compared to 2014 is the increased listening time in Denmark (+5 minutes). This increase is attributed primarily to DR's digital channel P5, which has climbed from the ninth largest channel to the fourth largest, partly due to a programme restructuring. Even Iceland shows an increase in listening time, but since Icelandic data are based on a specific week instead of annual averages, the results are sensitive to individual events.

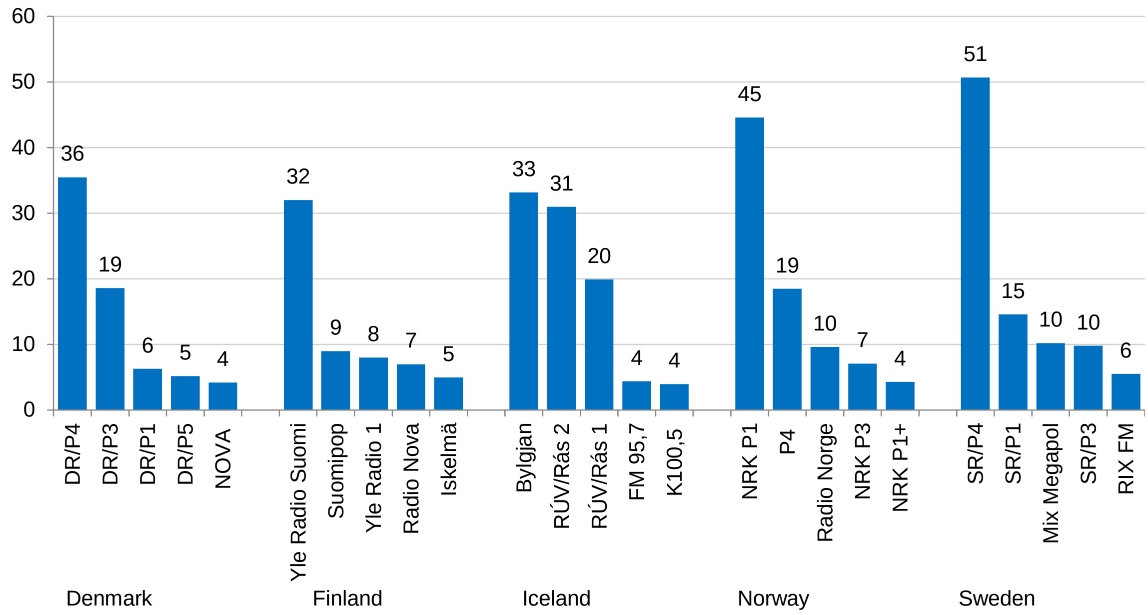
The age factor
The elderly listen to the radio more than younger people do, in both reach and listening time (the same trend as for TV viewing). Both upward and downward changes in listening from 2014 to 2015 have been noted for different age groups, but they are fairly small and there is no clear pattern between countries. Age also affects what you listen to: older people listen mainly to public service radio, while younger people listen more to the commercial stations.

On-demand radio and podcast are not included in the official measurements, but according to other studies the age pattern is the opposite; i.e., youth and young adults listen more than the elderly. Listening figures are still low, however.

Public service radio reaches the largest audience
In the Nordic countries public service radio stands for the largest combined audience shares, the highest of which are found in Sweden and Denmark, with three quarters of the listening time each. In Sweden, SR stands for the whole audience share of 76 per cent, while in Denmark DR and the privately owned public service channel 24syv account for 74 and two per cent, respectively. NRK in Norway has two-thirds of the listening time, while Yle in Finland and RÚV in Iceland claim about half of the listening time in their respective countries.

Although the major radio stations have lost listeners over the years, they maintain a high reach and a significant share of listening time. The graph below shows the dominant position for the largest channel of each public service company – DR P4, Yle Radio Suomi, NRK P1 and SR P4 – with audience shares of 32-51 per cent in each country. These are all generalist channels, with a mix of national and regional broadcasts. Iceland's two largest channels – Bylgjan, the country's nationwide commercial radio station, and RÚV2 – are more equal, each with around a third of the listening time.

The five largest radio channels per country by audience share 2015 (per cent)



Sources: TNS Gallup Denmark, Finnpanel, Gallup Iceland, TNS Gallup Norway, TNS Sifo. Download graph in full format (PDF)

Towards a more fragmented listening

While listening to flow radio has stabilized, the digital development continues. This is covered in, e.g., the chapter on podcast in the DR Media Research report, which predicts that despite today's low listening, podcast might now be on the threshold of a breakthrough. And a report by Norwegian NRK's research department points at a more fragmented listening due to radio digitization. This refers foremost to the country's ongoing transition from FM to DAB, but also to the development towards more web radio, podcasts and other audio sources.

Moreover, the 2015 data show that the radio audience can change their listening patterns and embrace new, fully digital channels. In Denmark DR5 increased its listening (see above), and in Norway a fully digital channel from NRK entered the top-five list of channels with the largest share of listening. This channel, NRK P1+, with a focus on adults or older listeners, caught up with NRK P2 in 2015.

Radio tables available for download: Nordicom's table database (choose Nordic and Radio)

About the statistics: Nordicom compilations are based on data from the national survey institutes responsible for the official radio surveys. Differences in methods impair comparability between countries and years; see Radio surveys in the Nordic countries, basic facts (Excel). While the surveys measure listening to flow radio, some of the reports below also present other surveys and estimates for on-demand radio and podcast.

Sources: Data are compiled mainly from the following institutes and reports:
The DR Audience Research Department: Media Development reports (data by TNS Gallup Denmark)
Finnpanel: Radio listening in Finland 2015
Gallup Iceland's website (2015) / Capacent (earlier data)
TNS Gallup Norway: Årsrapport for radiolytting i Norge 2015 (data in English are presented by medianorway)
TNS Sifo: Radiolyssnandet i Sverige 2015

Other sources/Further reading (in Scandinavian):
Slots- og Kulturstyrelsen: Mediebrug på Internettet. Streaming, indhold og adgang
NRK Analyse: Mediebrug i Norge 2015 – Oppsummeringen
TNS Gallup Norway: Rikets medietilstand

TV viewing in the Nordic countries in 2015

Television | Nordic February 2016 | EH

The total linear TV viewing in the Nordic region is rather stable, but differences between groups are increasing. Older people watch more, while the young watch less. At the same time online TV viewing is growing, especially among the young. This is shown in comparisons of the 2015 TV data from the national survey institutes in the Nordic countries.

Around seven of ten Nordic people watch traditional television on a daily basis. In 2015, Norway was at the top with 74 per cent of the population watching TV on an average day. In Sweden and Denmark, where daily reach has decreased during recent years, 66 and 65 per cent of the population watch linear television daily. In Finland, with a more stable daily reach over the years than its Nordic neighbours, 72 per cent of the population watches TV on a daily basis. (Reach data for Iceland are not available.)

Viewing time dropped in Finland, increased in Sweden

Finland has the Nordic region's most avid TV viewers, watching 179 minutes per day in 2015, but at the same time the country shows the largest drop, from the peak of 184 minutes in 2014. In Denmark, the total viewing time stabilized at 172 minutes in 2015 after several years of sharp decline. Sweden, which has a lower viewing time – 155 minutes of traditional TV viewing per day – was the only country where viewing time slightly increased. Television viewing in Iceland fell, but since Icelandic data are based on a specific week instead of annual averages the results are more sensitive to individual television events.

TV-viewing time in the Nordic countries 2005-2015 (minutes/day)

	Denmark	Finland	Iceland	Norway	Sweden
	(Age 3+)	(Age 10+)	(Age 12-80)	(Age 12+)	(Age 3+)
2005	152	169	147	164	146
2006	150	169	149	156	154
2007	148	166	126	154	157
2008	167	177	183	174	160
2009	189	176	158	184	166
2010	201	178	141	183	166
2011	198	178	136	178	162
2012	195	183	128	175	164
2013	180	182	118	168	159
2014	173	184	130	174	153
2015	172	179	126	173	155

Note: The table refers to linear television. TV-meter data, except for Iceland 2005-2007 (diary). Yearly averages, except for Iceland (data for one week in autumn).
Sources: TNS Gallup Denmark, Finnpanel, Capacent Iceland, Gallup Iceland, TNS Gallup Norway, MMS.
Download table: Daily TV viewing time, total 2005-2015 (Excel file)

Older watch more, young watch less

Older people, the group that spends the most time watching television, have increased as an audience throughout the Nordic countries. With the exception of Finland, where the viewing time declined for – more or less – the entire population, the viewing time of older people continued to increase in 2015.

For children, adolescents and young adults, the trend is the opposite. In 2015 the linear TV viewing time among Danish 12-18-year-olds fell by 12 minutes per day, and in Finland the young aged 15-24 and 25-34 years decreased their viewing by ten and 14 minutes, respectively. In Norway both 12-19-year-olds and 20-29-year-olds decreased their TV viewing by nine minutes, while in Sweden the largest drop – of 12 minutes per day – was among 25-39-year-olds.

TV-viewing time among youth and young adults in the Nordic countries 2010-2015

	Age	2010 Minutes/day	2015 Minutes/day	Change 2010-2015 Minutes/day	Change 2010-2015 Per cent
Denmark	12-18	136	65	-71	-52%
	19-34	202	151	-51	-25%
Finland	15-24	95	67	-28	-29%
	25-34	137	124	-13	-9%
Norway	12-19	111	67	-44	-40%
	20-29	177	119	-58	-33%
Sweden	15-24	99	68	-31	-31%
	25-39	146	108	-38	-26%

Note: The table refers to linear television. Sources: TNS Gallup Denmark, Finnpanel, TNS Gallup Norway, MMS.
Download table: Daily TV viewing time by age 2005-2015 (Excel file)

Compared to 2010 – when the viewing time in the Nordic countries peaked after the digitization of terrestrial networks, which greatly increased access to numerous TV channels – youth and young adults have reduced their daily TV viewing by, in some cases, roughly an hour. The numbers differ somewhat between countries and years, but follow the same tendencies.

At the same time, viewing of online TV in the Nordic countries is increasing, and especially young people are switching platforms for their viewing. According to data for Denmark and Sweden, adolescents and young adults use TV and film-streaming services roughly one to 1.5 hours per day, compared to half an hour in the general population. Online-TV viewing will be subject to a separate overview in due course.

Download TV-tables from Nordicom's statistical database (Excel files):
Daily TV reach 2005-2015
Daily TV viewing time, total 2005-2015
Daily TV viewing time by age 2005-2015
The five TV channels with largest daily reach 2015. Reach 2005-2015
The five TV channels with largest audience shares 2015. Shares 2005-2015
Public service TV audience shares 2005-2015
The TV channel families with the largest audience shares 2015
Nordic TV-meter surveys, basic facts

About the statistics: Nordicom's compilations are based on TV-meter data from national survey institutes responsible for the official TV surveys. The surveys measure traditional TV viewing but the reports also present, to various extents, other surveys and estimates for non-linear viewing.

Sources: Data are compiled mainly from the following institutes and reports:
The DR Audience Research Department: Media Development reports (TV-meter data by TNS Gallup Denmark)
Finnpanel: Television viewing in Finland 2015 (see TV Year 2016 Press Event)
Gallup Iceland's website (2015) / Capacent (earlier data)
TNS Gallup Norway: TV-seing i Norge 2015 (TV data in English are presented by medianorway)
MMS: Årsrapport 2015 (annual report in Swedish)

Increasing video-on-demand viewing in the Nordic countries

Viewing of audiovisual content is increasing in the Nordic countries. This is due to a growth in video-on-demand viewing while at the same time the overall consumption of linear TV is quite stable.

The Nordic region is characterized by high Internet use and access to broadband and devices such as computers, tablets and smartphones. That this is a good basis for the streaming market is shown in data on an increasing use of video-on-demand services in the Nordic countries.

Comparisons between countries still difficult
Due to the lack of industry standards for video-on-demand measurements, and to surveys including different numbers and types of streaming services, comparisons between countries should be made with some caution. That said, however, some basic Nordic trends can be noted. These are described below.

For this overview we have used openly available data from the survey institutes responsible for the official measurements of traditional TV, plus some complementary information. For Denmark, Norway and Sweden we have reach data for various streaming services, and for Finland and Sweden data on streaming starts for streaming TV services with essentially open content. We have no data for Iceland.

YouTube, public service and Netflix at the top
Viewing of streaming video has grown in recent years. As often happens, the trend is led by the younger age groups, who are simultaneously watching less and less traditional television, which indicates a switching of platforms for audiovisual content.

YouTube is the most popular streaming service. Here we have no comparable Nordic data, but in Sweden nine of ten 9-19-year-olds and more than half of all Swedes aged 9-99 years watch YouTube on a weekly basis. The use on a daily basis is also considerable, with seven of ten young people and over a third of the population watching YouTube content daily (data by MMS). YouTube is also the medium which Nordic teenagers would miss the most, according to a Nordic study by Nordvision (see separate article below).

About video streaming services

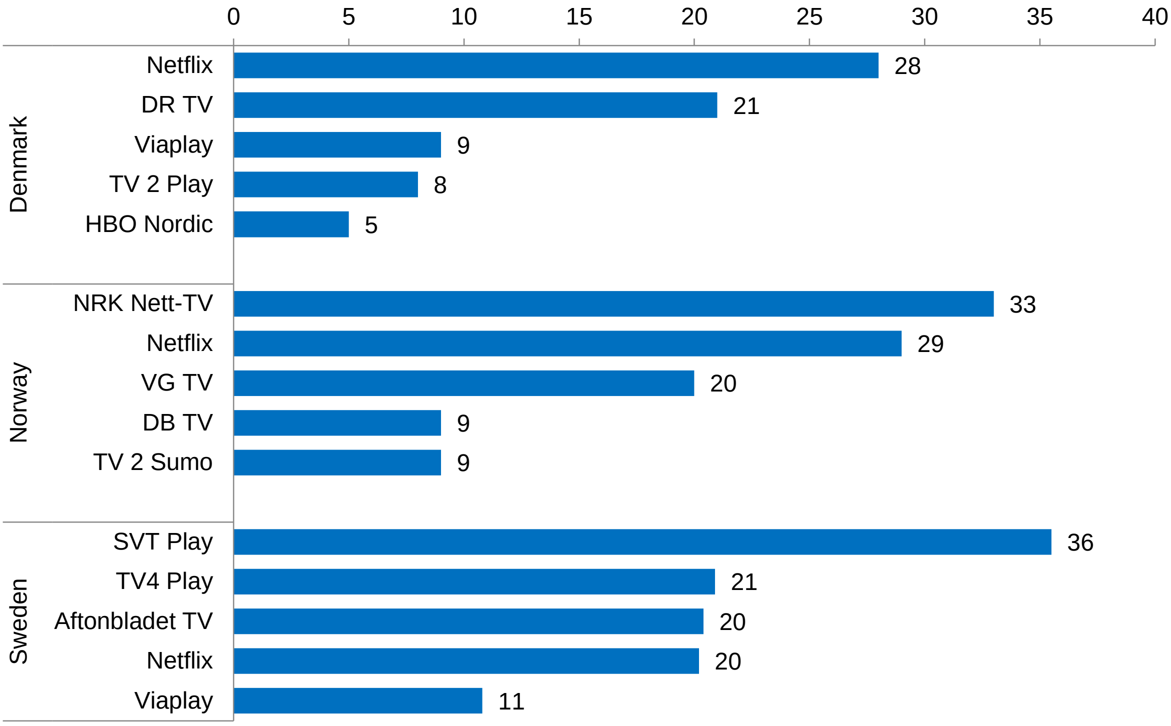
Online TV and film streaming sites include both openly available and payment (SVoD) services.
The *open* services are represented by TV channels' online streaming services, financed by either public service funding (i.e. license fees or special taxes) or commercials. Some of the commercial services can have a small part of their content reserved for premium customers. *Subscription* TV and film streaming services (SVoD) include the TV companies' premium sites (offering advertisement-free versions of the open equivalents), the pay TV channels' online offering or distributors' channel packages online, and last but not least pure SVoD services like Netflix and HBO.

Parallel to the TV/film services is a range of video-on-demand services offering mainly short clips – but also some longer programmes – which are mainly open services but also offer some premium content. These include, e.g., video streaming services of the daily press, such as*Aftonbladet* mentioned above, but also YouTube and the like.

Video content via social networks could possibly also fit into this category, but is not included in any of the surveys above.

Among the services that have the greatest audience are the open streaming services offered by public service broadcasters. Of the paid services, Netflix is the major player. In Norway and Sweden, the streaming services run by the tabloids VG and Aftonbladet are high on the list of the most used services. Both belong to the Schibsted Media Group and are predominantly open and funded by commercials, but they also offer premium content.

Weekly reach of different streaming services in 2015 in Denmark, Norway and Sweden (per cent)



Sources: TNS Gallup Denmark, TNS Gallup Norway, MMS. / See "About sources and surveys" on the next page.
(Tables on weekly and daily reach are available in Nordicom's table database. Choose Nordic – Television – Use)

Denmark

Four of ten Danes watch TV streaming services weekly, according to a report from DR Media Research. On average, young people stream TV content for more than an hour each day, compared to half an hour per day by Danes in general. Netflix and DR TV are the dominating services, but if YouTube were included, it would top the list.

According to a report on media use on the Internet by the Danish Agency for Culture and Palaces, nearly half of the Danes stream TV-programmes/films from TV channels' or other streaming services, or use music streaming services, at least weekly. Among 12-34-year-olds eight out of ten persons use streaming services each week, but the viewing/listening then declines with age.

Norway

In Norway two of ten people watch TV and film streaming sites, and almost four out of ten watch other video-on-demand sites on a daily basis. This is quite stable compared to 2014, but looking a few years back, a great deal has happened. In 2012, for example, two-thirds of the population stated that they rarely or never watched TV/film online, while in 2015 the proportion of these non-viewers had dropped to a third. In Norway there are three main streaming players: NRK web-TV, Netflix and VG TV (which also operates a linear TV channel).

Sweden

In Sweden, every fourth person (27%) watches an open streaming service on a daily basis, while 16 per cent use a subscribed one (SVoD). The young are the most frequent users, with an average of an hour streamed viewing a day, compared to half an hour in the whole population. On a weekly basis over half the population watches an open streaming service, while three of ten watch a subscription service. Dominating services are SVT Play, watched by just over one in three Swedes weekly, followed by the equally open services TV4 Play and Aftonbladet TV. Netflix is the largest paid-for service.

If YouTube is included in the open streaming services, their daily use increases to almost half of the population. YouTube also significantly adds to the daily viewing time, with 40 minutes extra for the 9-19-year-olds and more than 15 minutes for the population as a whole.

The average number of streaming starts for online TV in 2015 was almost 80 million per month, a sharp increase from 50 million in 2014. Data include the open streaming services of SVT, UR, TV4, MTG TV and the Discovery Network. SVT Play and TV4 Play dominate with 60 and 28 per cent of programme starts, respectively.

Finland

In Finland, the average number of streaming starts for online TV was 47 million per month in 2015, up from 41 million in 2014. In relation to the population, the numbers for Finland and Sweden are at the same level with around eight streaming starts per inhabitant per month. The Finnish survey includes open streaming services from the public service broadcaster and the largest commercial TV companies: YLE Areena, MTV3's Katsomo and Nelonen Media Ruutu, of which YLE Areena has the most viewers.

About sources and surveys:

Denmark: Weekly reach data are based on the survey Index Danmark/Gallup by TNS Gallup, as presented in the DR Audience Research Deparment's Media Development 2015. Data cover Q2+Q3/2015 in the population 12 years and older. The data in the report by the Danish Agency for Culture and Palaces (Mediebrug på internettet) are based on the Agency's own questions in Index Danmark/Gallup 1 half-year/2015, and show the percentage of the Internet population, i.e. 97 per cent of the Danish population aged 12 and older.

Norway: Reach data are derived from TNS Gallup Norway and its survey TNS Gallup InterBuss, Q4/2015, and are based on the Internet population, i.e. 96 per cent of Norwegians aged 15 years and older. The data are presented in TNS Gallup's presentation Rikets medietilstand. Medietrender 2016.

Sweden: Reach data comes from the MMS Web TV survey (CATI) for Q4/2015, and are reported in the MMS report Trend & Tema 2015:4 (no open access). The population is those aged 9-99 years.

Swedish and Finnish streaming starts are presented in the annual reports by MMS and Finnpanel, respectively, and are measured via the comScore Digital Analytix system. The measurements are done using a digital measurement code installed in web players for the services that have chosen to be included. Data are presented on an annual basis.

Young people's media use in the Nordic countries

Media Use | Nordic March 2016 | EH

Media use is becoming increasingly fragmented, which is particularly evident among the young. A study initiated by Nordvision now shows that changes in young people's media habits follow the same pattern throughout the Nordic region.

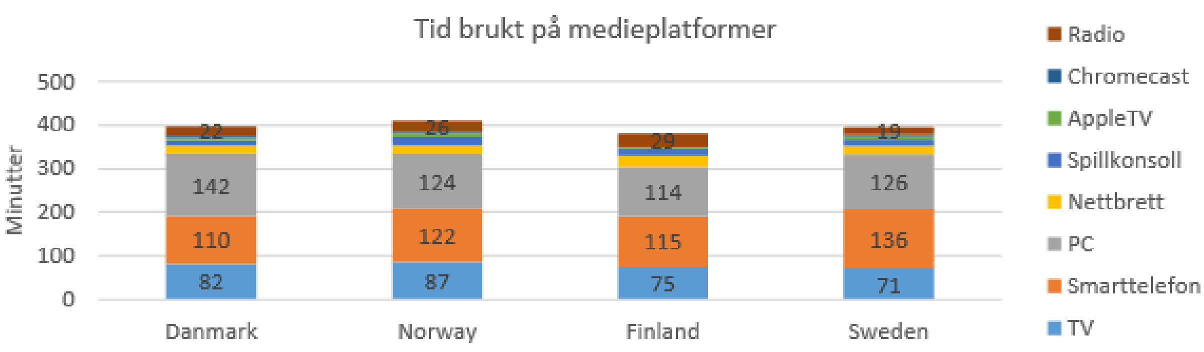
With increasing access to various devices and a greater range of services and content – both locally and globally – media use is changing. In the Nordic countries, young people’s viewing of traditional television has declined for several years while their interest in social media and streaming services has increased. And the competition for their attention is great.

Against this background, in 2015 Nordvision commissioned a survey among 13-29-year-olds in Denmark, Finland, Norway and Sweden. The results show that the changes among the young are similar in all Nordic countries, indicating that the development entails global and structural trends rather than national and cultural ones.

Most time on smartphones and computers

Young people in the different Nordic countries spend about the same amount of time on media overall, and the allocation of time to different platforms is also similar across the Nordic region. Young people spend most of the time on smartphones and PCs, followed by traditional TV.

Time spent on different media platforms among 13-29-year-olds in the Nordic countries (minutes/day)



Categories in English: Radio, Chromecast, AppleTV, Game console, Tablet, PC, Smartphone, TV.
Source: "Mediebruk i Norge 2015 – Oppsummering" (page 16) by NRK Analyse

For seven of ten Nordic 13-19-year-olds, the device they would miss the most is their mobile phone. Two of ten teenagers answer that it would be their computer, while only a small per cent say they would miss TV the most.

YouTube and Netflix most popular

While traditional TV viewing is decreasing, watching moving images through other platforms and services shows the opposite development. The Nordic 13-19-year-olds spend the most media time per day on YouTube (an average of 38 minutes/day), followed by Netflix (24 minutes), other streaming services (20 minutes), and any of the Nordic public service companies (20 minutes).

When the teenagers were asked which medium they would miss the most, the most common answers were YouTube (29%), Facebook (16%) and Spotify (12%). Seven per cent said they would miss the public service output the most. As for YouTube, young people usually seek niche content and specific clips. For the 13-19-year olds the most popular content is music, different YouTube stars, and other content they consider entertaining or funny.

Social media
Facebook is still the social media platform with the largest reach among Nordic youth. But when it comes to commitment and contributing their own content, Instagram, Snapchat and WhatsApp seem to get them more involved. The Norwegian report also points to some differences between the Nordic countries: Snapchat is more popular in Norway than in other Nordic countries, while WhatsApp is huge in Finland.

Sources and further reading:
There is no Nordic report publicly available, but some Nordic and national results are presented in the following reports:
Nordvision press release 2015-12-18: Lives and media habits of 13-29-year-olds
DR Audience Research Department: Media Development 2015 – chapter 9/Generation instant pay-off
NRK Analyse: Mediebruk i Norge – Oppsummering 2015

About the survey: Nordvision, a TV and media partnership involving the Nordic public service organisations, has financed a series of analysis projects across the Nordic countries since 2013. The analyses, conducted by the research departments of DR, Yle, NRK and SVT, have focused on the age segments 3-6, 7-12 and 13-29 years. The last age group was the theme for the project in 2015, which began with a qualitative pre-study in Denmark among fifteen 13-29-year-olds, aiming to better understand their media use. Based on these results, the research institute Norstat conducted the main survey with 1,000 respondents in each country in September and October, 2015.

Greenland: Viewing and listening survey 2015

Media Use | Greenland March 2016 | EH

Nine of ten Greenlanders watch television on a daily or near-daily basis, while more than eight of ten listen to the radio. Nearly all Greenlanders use the public service broadcaster KNR's TV, radio or online services. This is shown in a media use survey for 2015.

KNR, in cooperation with the research institute Epinion, has conducted a survey of the Greenlandic population's listening and viewing of radio and television during 2015, with the main aim of getting a picture of the population's use and attitude towards KNR's programmes.

According to the report, nine of ten watch KNR's television programmes and just as many listen to their radio output. The share of population using KNR's streaming service has increased from 17 per cent in 2014 to 45 per cent in 2015. Approximately half of the young and middle-aged say they stream KNR programmes, compared to every fourth person among the elderly. On average, the Greenlanders watch 5.6 hours of television and listen to the radio 6.2 hours daily, which is stable in relation to 2014.

Download *KNR Seer- og lytterundersøgelse 2015* (in Danish) at KNR's website or directly (PDF)

About the survey: The study is based on 700 telephone interviews with a representative sample of the population aged 18 years and older. The survey was conducted during the period December 2, 2015 – January 7, 2016.

The Media Market

The largest Icelandic media companies in 2014

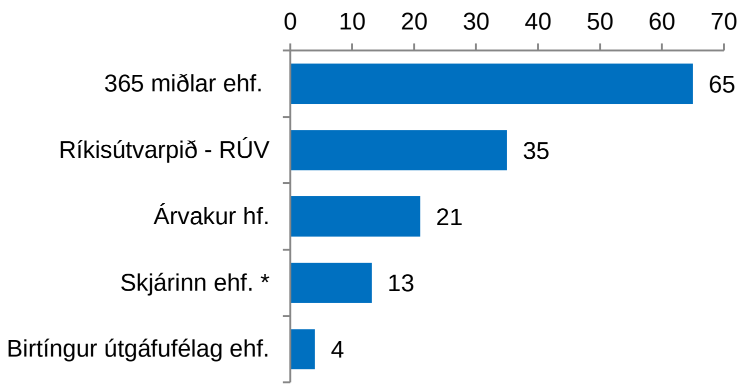
Media companies | Iceland February 2016 | FÞG

Iceland's largest media company, the privately owned 365 miðlar ehf., is twice as large as the second largest media company, the public service broadcaster RÚV, and three times as large as the newspaper publisher Árvakur hf. This is shown in 2014 revenue statistics.

The Icelandic media market is dominated by a few domestically owned media companies, which operate the largest TV and radio stations – both private and public – as well as the largest newspapers and magazines.

At the top of the list is 365 miðlar ehf., a private company with husband and wife Jon Asgeir Johannesson and Lilja Palmadottir as majority owners. It runs the TV station Stöð 2, a number of radio stations, the daily free newspaper Fréttablaðið, the news website visir.is, and other websites. The 2014 revenues of 365 miðlar ehf. of 65 million Euros are up from 57 million in 2013.

The five largest media companies in Iceland by revenue in million Euro 2014



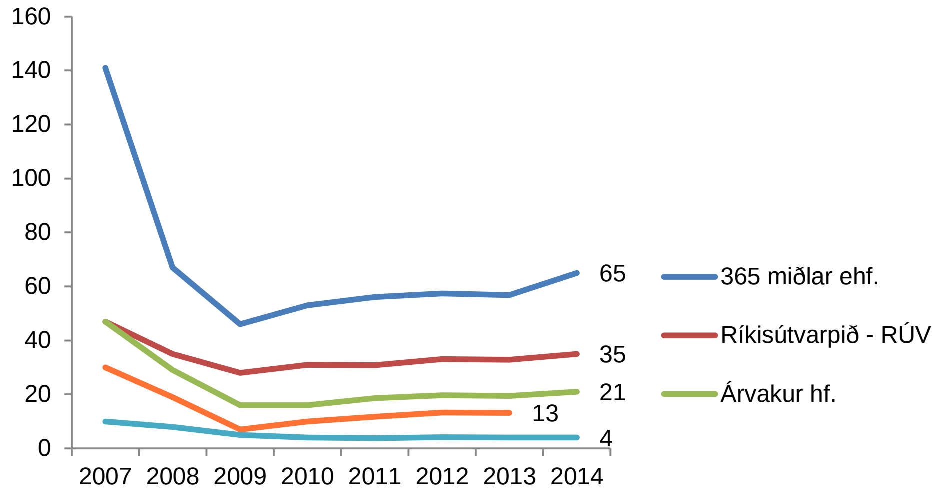
* Skjárinn: Revenue 2013; data for 2014 are not available. Source: Frjáls verslun 2014

As before, RÚV, the national broadcasting service (owned by the state) came in second, with 35 million Euros in revenues. Its revenues have remained relatively stable in recent years, but have declined somewhat when inflation is taken into account. In third place is Árvakur hf., the owner of the daily newspaper Morgunblaðið, with 21 million Euros in revenues. In recent years this newspaper has experienced hard times with growing competition from free newspapers, losing many subscribers. On the other hand, its website mbl.is is the most visited website in Iceland.

Skjarinn ehf. is owned by the largest telecommunication company in Iceland, Siminn hf. Its main output is its TV station, which focuses on entertainment and has no news programmes. Birtingur ehf., in fifth place, is majority owned by lawyer Hreinn Loftsson and publishes several monthly and weekly magazines of various sorts.

Revenue statistics clearly show the impact of the 2008 economic collapse in Iceland. Looking solely at the three largest media companies in the country we see that their revenues, 235 million Euros in 2007, have since only managed to reach 121 million Euros. On the other hand, currency rates exaggerate this development as the 2008 collapse dramatically devalued the Icelandic Krona. All the same, it is fair to say that Icelandic media companies have been struggling, their recovery has been very slow, and they are still very far from their best revenue years.

The five largest media companies in Iceland by revenue in million Euro 2007-2014, in current prices



* Skjárinn: Revenue data for 2014 not available.
Source: Frjáls verslun 2007-2014
Full table including revenues 2004-2014 (Excel)

Note that these revenue statistics place Icelandic media companies very low compared to the largest Nordic media companies, which is to be expected given the small market of Iceland's meagre population (approx. 320,000 inhabitants in 2014). Looking at the average revenues of the five largest media companies in each of the five Nordic countries in 2014, we see that those of the Swedish companies are 45 times higher than in Iceland while this figure is down to 23 times higher in Finland (populations of 9.7 and 5.5 million, respectively).

Download tables (Excel):
The five largest media companies in each Nordic country 2004-2014 (Euro)
The five largest media companies in each Nordic country 2004-2014 (national currencies)

About the statistics: Revenue data are provided by Statistics Iceland, which is a member of Nordicom's statistical network. The source is Frjáls verslun, an Icelandic trade magazine, which annually presents the economic results of the largest Icelandic companies.

Conference on free daily newspapers

Newspapers | Europe March 2016 | IW

For the first time ever, a research conference took place that focused on free dailies only. The host was the Université de Lorraine in Metz, France, and the conference was held in March 2016. A conference with such a specific theme doesn't attract many researchers; however, it does attract intensely interested researchers. A common question that was highlighted in different ways by the participants was whether or not free dailies have some kind of public value. Danish and Swedish market conditions were discussed, as well as, for example, Israeli, French and Austrian.

The very first free daily started over 20 years ago – 1995 in Stockholm – and thereafter free dailies spread around the globe. Research about the phenomenon has been rare. Several reasons can account for that: for example, Internet media began to develop at the same time and were regarded as more exciting, and free dailies tend to have a low status among academia, the media industry, and politicians.

Today there are around 55 free daily titles (counting, for example, all Metro editions as one) in 25 countries. The total number of published copies is around 13 million a day. Free dailies were most influential around the year 2007; at that time there were 140 titles in 31 countries with a circulation of approximately 27 million copies a day (www.newspaperinnovation.com, 2014).

Commercial products with low quality?

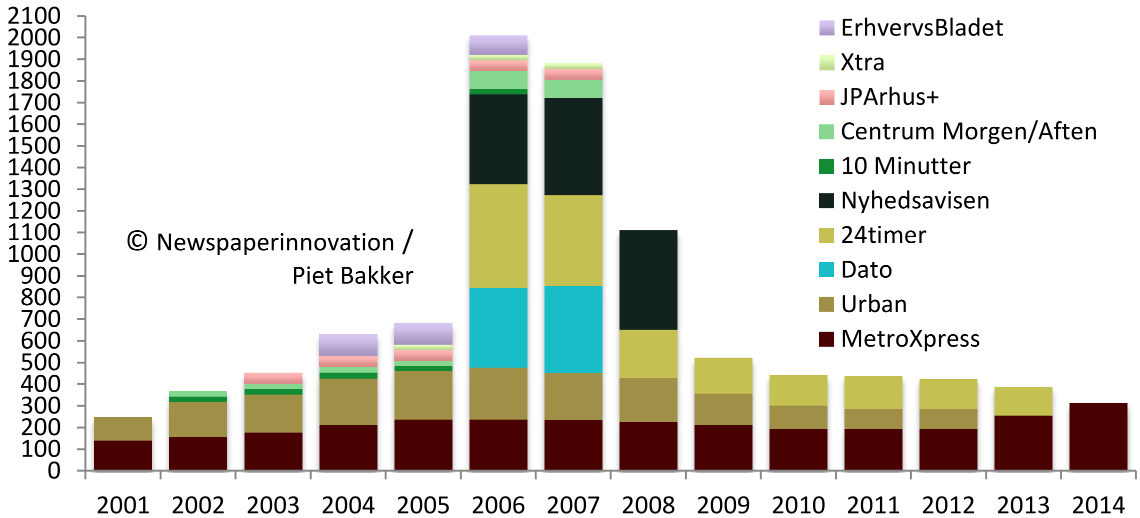
A question asked by all participants at the conference was whether free dailies have a substantial public value. The answers differed by country, but can be generally synthesized to a "yes" – free dailies do matter.

Studies from Austria and France, as well as Denmark and Sweden, show that free dailies, in different respects, do have a public value. One important explanation is that they are easily accessed, but it is also true to say that their content is of importance. Even though popular debate about them often portrays these titles as having low product quality, studies from all countries represented show that this is not the case. As an illustration, consider the following example from Denmark, in a conference paper written by Kirsten Sparre from Aarhus University.

The example of MetroXpress in Denmark.

MetroXpress (owned by Kinnevik) was launched in 2001 with a circulation of 140,000 copies a day. The competition in the marketplace was tough. Urban (owned by Berlingske Media) had already launched that same year and during 2006-2007 the competition was intensive, with as many as nine competitors in the Danish market (see figure 1). Today MetroXpress is alone in the market (now owned by Swiss Tamedia) with a circulation of around 300,000 copies a day. MetroXpress must today be considered a successful publishing house, with a printed paper, a website, high activity in social media, and a provider of broadcast news items at train carriages.

Figure 1. Free dailies in Denmark 2001-2014 (circulation, thousands of copies)



During 2013 the publishing house was reorganized. A new format was launched, with a new layout, a new distribution system, and a new editorial profile. Among other changes, 11 out of 40 journalists were moved from the news desk to the desk for social media. MetroXpress has also fulfilled the quality demands for receiving a state press subsidy. The demands are as follows:

- At least three full-time employees and an editor-in-chief is required
- Half of the content must be editorial
- More than half of the content must be about politics, society, and culture
- At least a sixth of the content must be produced by the paper itself (not by news agencies etc.)

MetroXpress met these demands and received a press subsidy in 2014 as well as in 2015. Kirsten Sparre also reported that MetroXpress has been nominated for several prizes and is cited in other media to a great extent. Sparre ended the presentation with a question: is it even possible for others to learn something from MetroXpress?

The creative industry in Norway 2008-2014

Creative Industries | Norway February 2016 | EH

The value creation in Norway's creative industries increased overall between 2008 and 2014, but the media industry stands out negatively. These are some of the results from a study by the BI Centre for Creative Industries in cooperation with the Menon consulting company.

Norway has seen growth in the creative industry, in both value and employment. There has been a growth in value added of 15 per cent during the period 2008-2014, as well as a growth in employment of slightly over nine per cent. But there are major differences in how the various industries have evolved during this period.

Media on the decline

The highest value-added growth during the period was noted for the industries of education and teaching as well as visual activities, while newspapers and magazines, books and computer games showed a decline in value creation. The industries of newspapers and magazines as well as computer games also show a decrease in employment.

The decline in value creation and employment in newspapers and magazines is so great that it affects the whole industry negatively for the period 2008-2014. Without newspapers and magazines, the value-added growth during the period constitutes 27 per cent. The very different developments within the respective industries during the period 2008-2014 are related to the financial crisis of 2008 and the degree of digitalisation in different sectors.

Read more and download the report Kreativ næring i Norge 2008-2014 [Creative Industry in Norway 2008-2014], in Norwegian

About the BI Centre for Creative Industries (BI:CCI): The BI Norwegian Business School established a research centre for the creative industries in autumn 2014 to promote research and education in this field in Norway. The Centre operates within nine cultural industries: music; film, games and photo; TV and radio; architecture; design; print media; advertisement and advertising; heritage; and the arts. The common denominator for these industries is that they all engage in form-conscious communication in a more or less creative way.
Read more

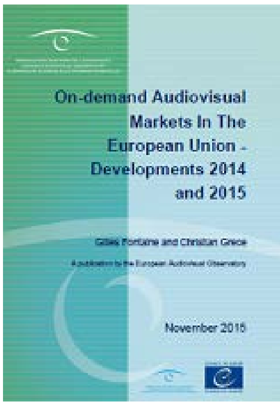
Trends in Europe’s audiovisual markets

The Media Market | Europe March 2016 | EH

The European audiovisual legislation is currently under review. In order to provide background facts for the review, the European Commission has published a number of studies, covering aspects such as trends in the audiovisual markets and the protection of minors.

Since the Audiovisual Media Services Directive (hereafter AVMSD) entered into force the media market has significantly and rapidly evolved, and the aim of the ongoing evaluation is to assess the directive’s overall functioning in light of recent developments of the market, technology and consumption patterns.

Consequently, the European Commission (DG CONNECT) has commissioned several studies in order to prepare the review of the AVMSD. The following research reports were published on the Commission’s website in March:



On-demand audiovisual markets in the EU

This study provides information concerning viewing patterns online, online advertising, the EU Subscription Video-on-Demand (SVoD) market, and the origin and visibility of EU films on VoD services.

As for the Nordics, Sweden, Denmark and Finland, along with the UK and the Netherlands, are regarded as developed SVoD markets, characterized by a quick adoption rate, early entry of Netflix, and a local reaction of national players. High broadband penetration, high pay-TV penetration, and high English-language literacy are identified as factors that have favoured Nordic consumers’ quick adoption of SVoD services. (Since the report covers the EU only, Norway and Iceland are not included.) The report was prepared for the European Commission by the European Audiovisual Observatory.

Read more and download the report here

Study on data and information on the costs and benefits of the AVMSD

This document groups together separate reports concerning audiovisual services, data on market revenues and investments, and legal information concerning the protection of minors. It was prepared for the European Commission by the European Audiovisual Observatory. Read more and download

Study on the exposure of minors to alcohol advertising on TV and on online services

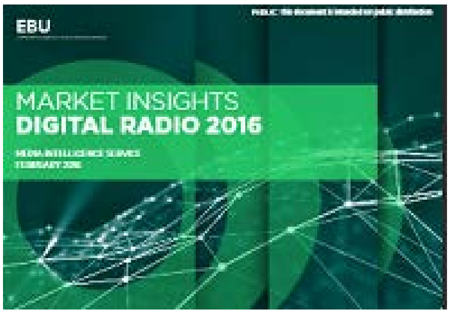
This study provides an overview of minors’ exposure to alcohol advertising on TV, on-demand services and other online services. It covers a number of EU Member States and includes an analysis of the content of a number of alcoholic beverage advertisements. It was prepared for the European Commission by Ecorys. Read more and download

About the AVMSD at the European Commission's website
About the AVMSD review process (REFIT)

Digital radio in Europe and other EBU reports

The Media Market | Europe February 2016 | EH

The EBU’s Media Intelligence Service has published the first edition of a yearly report on digital radio, which gives an update on the market status of digital terrestrial radio in Europe. The organisation has also made public the main findings from two reports on public service media funding and licence fees.



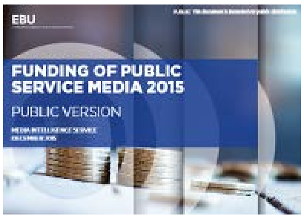
Digital radio in Europe 2016

This report offers insight into the roll-out of digital terrestrial radio in the European markets, and when relevant, other digital platforms. The report also highlights developments over the past year in digital radio, in the areas of content and offer, technology, switchover processes, policy and regulation, etc. Also included is a study on the role of public service media in the roll-out process, as well as some prospects for the year ahead.

In the overview of digital radio roll-out the countries are categorized as digital leaders, digital embracers, digital newbies, and wait-and-see. Of the Nordic countries, Norway (which will be the first country to close down FM and switch over to digital radio in 2017) and Denmark (where the Ministry of Culture has published a new roadmap including criteria for switchover) are classified as digital leaders, together with Switzerland and the United Kingdom.

Sweden, where during 2015 the Government said no to a digital radio switchover proposal, is referred to as a wait-and-see-group. (Finland and Iceland, which currently have no plans to close down their FM networks, are not included in the report.)

Read more and download the report here



Funding of public service media 2015: public version

This presentation aims at providing an international perspective on the financial situation of public service media in the EBU area in 2015, covering 63 public service media organisations in 45 countries (including 27 EU countries). Available for download at the EBU’s website.

Licence fee 2015: public version

This report focuses on the licence fee that exists in 27 markets of the EBU area, including 17 EU countries (situation on 1 January 2015), and presents data on the level of licence fees in different countries, how it is set, different collection methods, etc. Available for download at the EBU’s website.

About the EBU: The European Broadcasting Union (EBU) is an alliance of public service media. It has 73 member organizations in 56 countries that run over 780 TV and 1,040 radio services. Read more.

Public service news and digital media

Digital Trends | Europe March 2016 | EH

Can public service news organisations stay competitive in a digital environment? A new Reuters Institute report shows that while some public service news organisations in Europe – notably the BBC in the UK and Yle in Finland – have invested heavily and are navigating the challenges brought by digital media well, others are struggling to adapt.

The report examines how public service media in six European countries – Finland, France, Germany, Italy, Poland, and the UK – are delivering news in an increasingly digital media environment.

High reach of news online in Finland and the UK
According to the study, public service media organisations in all six countries have a high reach for news offline, via TV and radio, but only BBC and Yle have a high reach for news online. These two are generally regarded as being ahead of most other public service media organisations, though they too are still heavily invested in traditional broadcasting operations and need to continue changing to keep pace with the environment.

Common traits between Yle and the BBC
Looking at the conditions under which Yle and the BBC operate, some key common traits are identified. Both organisations operate in technologically advanced media markets, are comparatively well funded, are integrated and centrally organised across various platforms and have a degree of insulation from political influence compared to other public service organisations, and internally, they benefit from a pro-digital culture.

The challenges will not go away
With technology developing at a fast pace, the digital challenges are not going to go away. The researchers warn that unless public service media organisations change their organisation to prioritise digital media, mobile platforms, and social distribution, they risk losing touch with their audience – the public they exist to serve, and which funds them.

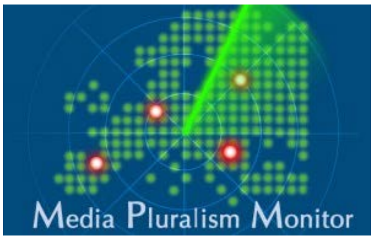
The report is available for download or can be explored online.

About the study: This report is the first of a series of annual Reuters Institute reports that will look at how European public service media companies are adapting to digital change. The analysis is based on interviews conducted between December 2015 and February 2016, primarily with senior managers and editors, as well as on survey data from the Reuters Institute Digital News Report.

Media Pluralism Monitor Report 2015

Media Pluralism | Europe March 2016 | EH

The Media Pluralism Monitor aims to assess the risks to media pluralism in the EU countries. The 2015 report, covering 19 countries, is now available. The results for Finland and Sweden, the two Nordic countries included in the study, show a generally good state for media pluralism, but with warning signs due to a concentration in media ownership.



The Media Pluralism Monitor is a tool designed to monitor media pluralism in EU member states. It is based on a study funded by the European Commission in 2009, which led to a first version of the tool defining a set of indicators and a scoring system. The MPM studies are conducted by the CMPF, the Centre for Media Pluralism and Media Freedom.

The Monitor assesses the risks to media pluralism based on a set of indicators covering four domains: Basic Protection, Market Plurality, Political Independence, and Social Inclusiveness. Examples of indicators included are the protection of freedom of expression, journalistic profession, transparency of media ownership, concentration of media ownership, independence of public service media governance and funding, access to media for different groups, and media literacy.

More information at the European Commission's website
The 2015 results at CMPF's website
The Finnish country report
The Swedish country report

Note: In the 2014 MPM study, the nine other member states were assessed, Denmark among them (read the 2014 Danish report). In 2016, the Media Pluralism Monitor will be applied in all EU member states and in two candidate countries.

Media Policy in the Nordic countries

Short about current media policy issues

Media Policy| Nordic March 2016 | EH

Norway: Online newspapers VAT-exempt from March 1
In Norway, VAT exemption for electronic news services entered into force March 1, 2016. So far, sales tax exemption has included newspapers on paper only, whereas newspapers and news online services, like electronic services, have been levied a VAT of 25 per cent. The ESA approved the VAT exemption for electronic news services in January 2016. Norway is the first country in Europe to introduce tax exemptions for electronic news media.
Ministry of Finance, News 19.2.2016 (in Norwegian)

Norway: Broad agreement on public service broadcasting policy
The Culture Committee in Parliament (Stortinget) has reached a broad political settlement regarding public service media. This agreement, among seven of the eight Norwegian parties, presents a list of recommendations to the Government in relation to the white paper (Stortingsmelding) on public service and media pluralism (June 2015). For example, the parties ask the Government to assess whether NRK should be organized as a foundation like in Sweden, and to ensure that the expert committee, which currently reviews alternatives for public funding for NRK, looks specifically at the Finnish funding model. All links below in Norwegian:
Ministry of Culture, Press Release 18.02.2016
Parliament (Stortinget) 02.18.2016
Agreement on public service broadcasting [PDF]

Sweden: Extended investigation time for the Media Inquiry
The Swedish Media Inquiry, which is assigned with analysing the need for new media policy tools when the press subsidies in their current form cease, has been granted an extended investigation time. The Inquiry, which was initially to present its proposal in April 2016, is now to submit its final report on October 31, 2016.
Ministry of Culture, press release 28.2.2016 (in Swedish)

Sweden: Memorandum on public service media by the Media Inquiry
In March, the Swedish Media Inquiry presented a memorandum on publicly funded media to the Ministry of Culture. The memorandum lists 17 points that the Inquiry suggests should be investigated before a new concession period for public service media, e.g. the future funding model and public service media's possible impact on the commercial media landscape. (Current broadcasting licenses for SVT, SR and UR are for the years 2014-2019.)
Ministry of Culture 24.3.2016 (in Swedish)
The Media Inquiry's blog (in Swedish)

Working group proposes that YLE reduce its own production

Media Policy | Finland January 2016, updated April 2016 | MJ

The Finnish Broadcasting Company YLE should reduce its own production, and instead outsource tasks and purchase services from independent production companies. This was one of the proposals of the working group appointed by the Finnish Minister of Transport and Communications in August 2015 to assess the Finnish media market. The working group published its report in December. A parliamentary working group is now working on the review of YLE's tasks.

The working group, led by ex-CEO of Nokia Professor Anssi Vanjoki, suggested that YLE function more as a distribution and purchasing organization in future. It also suggested that the share of external production be defined by cost instead of broadcast time. Accordingly, YLE should increase the share of independent productions to 30 per cent of all costs.

The working group suggested that part of the public service tasks can be carried out by commercial actors, and that, YLE's tasks should be specified by a parliamentary working group, which is to review the public service duty and funding of YLE during spring 2016. The parliamentary working group is now carrying out its task and the conclusions are expected for autumn 2016.

According to Vanjoki's group, outsourcing and the transition to a more competitive operating model would benefit the entire Finnish media market. The working group says that YLE's contemporary strategy, which the group claim is based on maximizing audiences and maintaining market leadership, significantly hampers the functioning of the commercial media. The negative consequences of the changes on employment, according to the working group, would balance out if the demand for the production by independent companies increased. The working group also proposed that YLE provide bloggers and video producers with a national digital platform.

YLE leaders: Impossible to realise
YLE's administration and leadership, while regarding the report as a welcome opening of a debate, claimed that the suggestion of a 30-per cent quota would be impossible to realise.

According to YLE CEO Lauri Kivinen, all Finnish TV channels together are already spending approximately 100 million Euros on programmes from independent production companies. The working group's suggestion would mean that solely YLE would spend about 140 million Euros on such external productions.

Director and Editor-in-Chief of YLE's news and current affairs, Atte Jääskeläinen, claimed in an interview that as a consequence, all YLE's culture, entertainment and drama production would be closed down and that the obligation to purchase this production from independent companies would negatively affect quality.

"No reasonable person would propose that the news and current affairs activity be outsourced. The consequences of such a move have never been good", he added.

17 suggestions on 18 pages
In all, the working group offered 17 different suggestions in its 18-page report. It recommended, for example, a deregulation of radio and TV advertising as well as the advertising of light alcohol beverages, setting the VAT tax rates for digital and physical content at the same level, and making the copyright system more flexible. Additionally, it recommended that media education programmes be reduced and that some of their sites be transferred to places offering continuing education.

The members of the working group were author Kalle Isokallio (ex-Nokia CEO), VD Mikael Jungner (ex-politician and ex-YLE CEO), and freelance journalist Reetta Meriläinen (ex-Editor-in-Chief of Helsingin Sanomat).

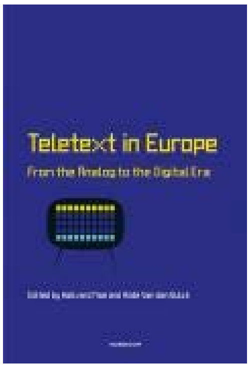
Link to the report (in Finnish, summary in English): The competent will thrive. Report by the working group assessing the Finnish media market

More on media inquiries in the Nordic region: In December 2015 Nordicom published, in English, an overview of current media-related investigations in the Nordic countries. Read more.

Publications from Nordicom

Teletext in Europe

From the Analog to the Digital Era



This book is about teletext: a “broadcast service using several otherwise unused scanning lines (vertical blanking intervals) between frames of TV pictures to transmit information from a central data base to receiving television sets”.

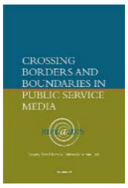
To the contributors to this book and possibly to many readers, this technical definition will feel out of place as it obscures the rich history of a formidable if forgotten medium. Nevertheless, it is the basic technology of teletext that sets it apart from other media and that, in part, has been the basis for much of what did and did not happen to teletext in terms of policy, institutional setting, content, users and scholarly interest.

Many contributions in this book will provide similar definitions, but mostly as a stepping-stone to explore all that has so far been left unsaid by this technical description. It is this gap in our knowledge of teletext in Europe that this book aims to fill. Editors are Hallvard Moe and Hilde Van den Bulck.

Read more, order or download

Forthcoming publications

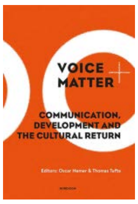
Currently, several publications are works in progress at Nordicom. The titles below will all be published in April or early May. For information on the future releases you are welcome to follow our news on the web, via RSS, Twitter or Facebook.



Crossing Borders and Boundaries in Public Service Media

RIPE@2015

This is the seventh in the series of RIPE Readers on Public Service Media published by Nordicom. The present collection is the culmination of the discourse during and since the RIPE@2014 conference in Tokyo. Editors are Gregory Ferrell Lowe & Nobuto Yamamoto. See previous books in the RIPE series (free to download).

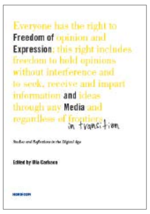


Voice & Matters

Communication, Development and the Cultural Return

This anthology largely reflects the topics dealt with at the fourth Ørecomm Festival in September 2014, organized by the Ørecomm Centre for Communication and Glocal Change, a centre of excellence in Communication for Development research with a bi-national base in the Øresund region. Editors are Oscar Hemer & Thomas Tufte.

Freedom of Expression and Media in Transition
Studies and Reflections in the Digital Age



The appropriate background scenarios of this new book are two celebrations in the Nordic countries during 2016: UNESCO and the Government of Finland as the hosts of the World Press Freedom Day main event in Helsinki on May 3-4, and the 250th anniversary of the Swedish Constitution and the Freedom of the Press Act.

This publication, which will be launched at the World Press Freedom Day in Helsinki, is published by the UNESCO Chair at the University of Gothenburg in collaboration with Nordicom, and can be regarded as a follow-up to earlier anthologies published by Nordicom: Freedom of Speech Abridged? Cultural, legal and philosophical challenges and Freedom of Expression Revisited. Citizenship and journalism in the digital era. It is hoped that this collection of research will contribute to knowledge development in the field, as well as to global and regional discussions about freedom of expression, press freedom, and communication rights in contemporary societies.

Editor is Ulla Carlsson, Professor and holder of the UNESCO Chair on Freedom of Expression, Media Development and Global Policy at the University of Gothenburg. Ulla Carlsson is the former Director of Nordicom.

Nordicom-Information 1-2016.
Theme: The Economic Challenges for Journalism
Changes in technology and usage patterns in the media industry have meant that in many cases the traditional funding models no longer hold for creating good and independent journalism. This new media landscape with its changed conditions necessitates new ways of thinking journalism and new ways of financing it. This issue, which contains articles in the Scandinavian languages as well as English, revolves around what the situation actually looks like in the Nordic countries, how to grasp the problem, and where solutions can be found. Editors are Ragnhild Mølster and Ingela Wadbring.
All issues of Nordicom-Information are available for download here.

MedieSverige 2016 [MediaSweden 2016]
In April a new edition of *MedieSverige* will be published, in Swedish. A smaller version than previous editions, approximately 70-80 pages, it will contain the most important information available for the reader to get an overview of the Swedish media landscape. Editor is Ulrika Facht.
The MedieSverige publications are available for download here (in Swedish).

Den svenska mediemarknaden 2016 [The Swedish Media Market 2016]
In April a new edition in Nordicom's report series on developments in the Swedish media market will be released, in Swedish. *Den svenska mediemarknaden 2016* contains a comprehensive review of the Swedish media industry's structural and economic development in the 2000s. The analysis focuses on the ownership structure of the Swedish media market. Author is Jonas Ohlsson.
The Swedish Media Market publications are available for download here (in Swedish)

European Media Policy Newsletter 1-2016
This newsletter from Nordicom provides an update on policy developments at the European level. A new issue will be published by mid-April. All issues are available here.

Nordicom's Online Publication Strategies

Nordicom books published online free-of-charge

Nordicom | April 2016 | IW

One of Nordicom's main responsibilities – commissioned by the Nordic Council of Ministers and the Swedish Ministry of Culture – is to publish statistics and analyses about the media sector. In addition, Nordicom is mandated to publish relevant research anthologies. During winter 2015/2016 Nordicom began free-of-charge downloading of most publications.

As commissioned by the Nordic Council of Ministers and the Swedish Ministry of Culture, media statistics are published online by Nordicom – Facts & Figures – but Nordicom is also charged with publishing comprehensive analyses annually. Two examples of such analyses are The Nordic Media Market (2015) and A Nordic Public Service Media Map (2013). In addition, Nordicom publishes different kinds of research anthologies. They are, with few exceptions, published in English. Two examples are Teletext in Europe (2016) and The Value of Public Service Media (2014).

From sales to dissemination

Nordicom – like all established publishers – traditionally sold publications only in print. Sales of print copies will continue, but, in parallel, most publications will be published in pdf-format online, free-of-charge. Online books will be published simultaneously with the printed books which are available for purchase. This new publishing strategy is a part of Nordicom's effort to disseminate knowledge freely rather than to sell it. For the foreseeable future, however, all books will continue to be also available in print.

Download, order or read more about Nordicom's books and journals.

Nordicom Review publishes online first

Nordicom | April 2016 | IW

Since its establishment in 1980, Nordicom Review has undergone major changes. Initially, the journal was a forum for specifically Nordic researchers in which to publish their research results. Today, Nordicom Review is no longer simply a regional journal, but holds its own with other research journals in the field of media and communication research. In order to better meet demands from researchers, publishing online first will be launched in spring 2016.

Timetables for journals differ widely in relation to 1) article submission, 2) review time, 3) author revision time, and 4) publication date. At Nordicom Review the first two steps usually take two to three months. Then the article is read by the editors at Nordicom and a decision is taken as to whether the article will be a desk reject or sent out on review. If it is to be sent out on review, the review is undertaken. The author(s) usually then resubmits the manuscript in one to two months.

A long delay then follows. When an article is accepted and completed, it usually takes a year before it is published. From an international perspective this is not rare, but from our point of view it is not desirable. From spring 2016 onwards, we will therefore start to publish accepted and completed articles online first, a practice already in operation at some other research journals.

Being published online first means that the articles, through the process of digital publishing, will receive its unique DOI-number and become searchable in international databases and at Nordicom's site. The articles are compiled and published in the printed edition of Nordicom Review twice a year. All this is part of the effort to raise the international impact of Nordicom Review.

Read the full article about the further development of Nordicom Review here.

Media Trends in the Nordic Countries

Editor: Eva Harrie

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Nordicom is a co-operative body of the Nordic Council of Ministers.

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

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

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