Media Trends
in the Nordic Countries

Newsletter from NORDICOM

No. 2, 2015 (June)

Content

Media use

Digital News Report 2015

News Consumption | Denmark, Finland June 2015

In Denmark and Finland traditional brands still dominate online news, but search and social media are growing. These are some findings in a new report on online news consumption by the Reuters Institute for the Study of Journalism.

The Digital News Report 2015 is the fourth annual report looking to track and compare changes in online news consumption across countries. It looks at twelve countries, among which the Nordic countries Denmark and Finland are included. The other countries are the UK, France, Germany, Italy, Spain, Ireland, the US, Brazil, Japan and Australia. Important to note about the survey sample is that because this survey deals with news consumption, anyone indicating they had not consumed any news during the past month was filtered out.

A surge in the use of mobile devices for news, a sharp increase in the use of social media for news and low interest in paying for news are some of the findings. The report also shows very different patterns of online news access across the countries.

The central role of the smartphone
Last year's report pointed at a rapid growth in both mobile phone and tablet use for news. The 2015 report finds even more evidence concerning the central role being played by smartphones. The growth in tablet use for news, however, has weakened in most countries.

Almost half, 46 per cent, of the global sample use smartphones to access news on a weekly basis, which is an increase from 37 per cent last year. The Danes are avid users, 57 per cent use a smartphone on a weekly basis – only Australia's 59 per cent is higher. The corresponding figure for Finland is 50 per cent, which is closer to the average but still comparatively high.

On average, a quarter of the sample across all countries says the smartphone is their main device for accessing digital news. In Finland this figure is 24 per cent, which is a considerable growth from 15 per cent in 2014, and in Denmark it is 28 per cent (24 per cent last year).

Sharp increase in use of social media for news
Social media, messaging apps, email and mobile notifications are becoming an increasingly important route to news. Among social media, Facebook is becoming a more and more dominant player, with 41 per cent finding, reading, watching, sharing or discussing news via Facebook each week. Also Facebook-owned Instagram and WhatsApp play a major role amongst younger groups.

Facebook is the top social media platform in both Denmark and Finland, but there are differences. In Denmark, 44 per cent use Facebook for news on a weekly basis, an increase from 31 per cent last year. In Finland the corresponding figure is 35 per cent, which is stable compared with last year. In Denmark, Facebook is followed by other global networks, while in Finland a domestic chat network, Suomo24, also enters the list, ranking third with 7 per cent of weekly news users.

Branded websites strong in Denmark and Finland
The report shows very different patterns of online news access across the countries. In Finland and Denmark, together with the UK, branded websites are often the starting point for any news journey (63, 54 and 52 per cent weekly use, respectively). The picture is different elsewhere, with, e.g., a search engine being the main gateway in Italy, Spain, France and Germany.

Search and social media are, however, growing as news starting points in Denmark and Finland as well. In Denmark, the share using search media on a weekly basis increased from 15 per cent to 29 per cent, while Finland remained stable at 26 per cent. Social media as starting points for news have grown in both countries: in Denmark use more than doubled from 16 per cent to 38 per cent and in Finland it grew from 24 to 28 per cent.

The number of people paying for digital news remains low. Even though Finns and Danes are the most willing to pay for news, only 14 per cent pay for news in Finland and 13 per cent in Denmark. (The lowest is in the UK, where 6 per cent pay for news.)

More key findings
Read the full report to learn more about key findings, such as: significant growth in video news consumption online, decline in desktop Internet, country differences in trust in the media, and increased competition from global digital brands.

Digital News 2015, full report
Explore the 2015 data at the interactive site

About the methodology: The report is based on an online survey – and as such the results will underrepresent the consumption habits of people who are not online (typically older, less affluent, and with limited formal education). The core purpose of the survey is to track activities and changes over time within the digital space – as well as to gain an understanding of how offline and online media are used together. The research was conducted by YouGov using an online questionnaire at the end of January/beginning of February 2015.

Digital News Report – Country report for Finland

News Consumption | Finland June 2015

A Finnish country report, *Uutismedia verkossa 2015*, presents the key findings of Reuters Institute Digital News Study in Finnish from the point of view in Finland.

The report is published by Esa Reunanen, Senior Research Fellow, University of Tampere in Finland.

Read more and download:
Uutismedia verkossa 2015. Reuters Institute Digital News Report - Suomen maaraportti (country report in Finnish)

Lessons from Finland: How the News Industry is Managing Digital Transformation and Trying to Stay Profitable (essay in English)

Norwegian Media Barometer 2014: Online Papers Larger Than Print

Media Use | Norway 2015

Online media use is going up. Increases in online newspaper reading and in streaming files from the Internet are two examples. At the same time, linear TV viewing is stable and radio listening is increasing. This is shown in the Norwegian Media Barometer, Statistics Norway's annual media survey.

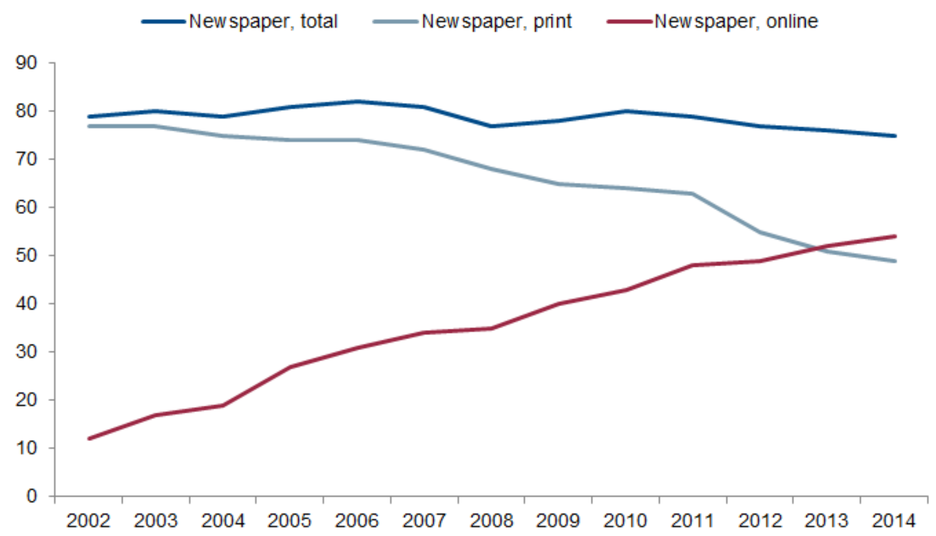
Norwegians are among the world's most avid web users. Of the country's population, 88 per cent use the Internet on an average day (85 per cent in 2013). Almost everyone has access to the Internet at home, 80 per cent have a smart phone and 70 per cent a tablet. And Internet-related media use, including social media, increases each year.

More read newspaper online than on paper

Daily newspaper reach, which long remained around 80 per cent, has seen a decline in recent years. Today, 75 per cent of the Norwegian population read a newspaper on an average day; the slight decrease from 76 per cent in 2013 is not statistically significant.

One clear change, however, is that online reading has passed paper reading: 54 per cent of the population read an online newspaper on a daily basis, while 49 per cent read the print version (in 2013, the distribution was 52 per cent online and 51 per cent on paper). Among 20-24-year-olds, 71 per cent read the newspaper on the web on a typical day, while 26 per cent read it on paper.

Daily newspaper reach: Total, print version and online version (share of population 9-79 years, per cent)



Source: The Norwegian Media Barometer 2014, Statistics Norway.

Linear TV is stable, SVOD is increasing

Like newspaper reading, linear TV viewing has decreased in recent years, after long having hovered at around 80 per cent. The 2014 figures are no different from 2013, though, with a daily reach of 74 per cent and viewing time of 132 minutes. This includes the 72 per cent who watch regular TV and the three per cent who view television channels broadcast simultaneously on the web. But even if the total viewership is stable, changes have occurred in different age groups. The younger (9-15 and 16-24 years) watched less TV in 2014 while the older (45-66 and especially 67-79 years) watched more than the year before.

At the same time, the viewing of video media increased from 15 per cent in 2013 to 22 per cent in 2014. This category includes recorded TV programmes, purchase or rental video, downloaded video files and streaming video services, and the increase is due to paid-for streaming services such as Netflix. Of the users, 60 per cent view paid-for videos streamed from the Internet. The greatest use is among the 16-24-year-olds.

Both radio and streaming audio files are increasing
A total of 64 per cent listen to the radio on an average day, up from 59 per cent in 2013. This includes listening to regular radio and simultaneous radio programmes online (59 per cent and 5 per cent, respectively). Radio listening is largest in the older age groups, but the most recent year's increase has occurred mainly among the young. Among 9-15-year-olds, the daily reach rose from 31 per cent in 2013 to 42 per cent in 2014, and among 16-24-year-olds listening is up from 40 per cent to 55 per cent. A fifth of the population, 19 per cent, listen to DAB radio on an average day.

Audio media, which includes e.g. CDs, MP3 and sound files downloaded from the Internet or streamed Internet files, has decreased. On a regular day, 39 per cent listen (41 per cent in 2013). Among the 16-24-year-olds the share of daily listeners is 62 per cent. Despite the overall decline, there is an increase in streaming content. In the group of young listeners aged 16-24, four out of five stream sound files daily.

Read more
The Norwegian Media Barometer 2014, Statistics Norway (introduction in English, report in Norwegian)
medianorway's database present data in English (newspapers, radio, television, ICT)

About the survey: The Norwegian Media Barometer survey provides data on people's access to and use of different media types. The survey is conducted through telephone interviews with a representative sample of the total population aged 9-79 years. The first Norwegian Media Barometer was conducted in 1991, and the report is published every year in March/April (PDF).

Nordicom-Sweden's Media Barometer 2014

Media Use| Sweden June 2015

Almost six and a half hours - that is how much time an average Swede spends daily on media use. Every year Nordicom conducts a survey on media use in Sweden: The Media Barometer. Results from the 2014 survey have now been published.

One main finding is that children and youth spend most of their media time on social media, while middle-aged and older people still spend most of their time on scheduled television programmes.

The media are an integrated part of our daily lives, and a large share of our waking time is devoted to media use. Today, around 75 per cent of inhabitants have access to a smartphone, which means they literary have the Internet in their pockets. Half of the population use the mobile device for social media. Only five years ago, 14 per cent of the population had access to a smartphone. This technical development is thus almost revolutionary. One can easily get the impression that the media landscape has been completely transformed. But is that the case?

- Partly, says Ingela Wadbring, Director of Nordicom. While technical developments are underway, many of our media habits stay the same. Still, on a normal day, eight out of ten spend one and a half hours watching television. But young people and older people have different habits: Among the young, watching YouTube clips is as common as watching ordinary television. Senior citizens hardly use YouTube at all, but spend a great deal of time on traditional television. Media use is a question of generational belonging.

Over time, the proportion of the population who read newspapers has decreased – independent of platform – while book reading has remained stable. On the Internet, a larger share use social media than use traditional media. There are, however, major differences between young people and older people regarding all media forms.

More information and basic tables in English
The Media Day 2014 (article published in March)

About the Media Barometer: The Media Barometer is an annual survey that analyses daily media use on different platforms among Swedish inhabitants between 9 and 79 years of age. Its purpose is to describe tendencies and changes in media use. The first survey was conducted in 1979. The survey is based on telephone interviews that are conducted across an entire year. Respondents are selected at random from the population. In 2014, 6,010 persons were interviewed. The main report is in Swedish, but some of the results are published in English online.

The Media Market

Find Finnish Media Statistics Online

Media Landscape | Finland May 2015

Statistics Finland has launched an extended online media statistics service, offering a comprehensive statistical overview of the media scene in Finland.

The site offers a wide range of data covering mass media economy and media consumption, newspapers, magazines and periodicals, radio and television. The tables, presented in English and Finnish, are downloadable in Excel format.

Joukkoviestimet 2013 – Finnish Mass Media

Moreover, Statistics Finland's biannual publication Finnish Mass Media is available for download in PDF format. The tables in the publication are presented in Finnish and English, and the book provides a summary in both English and Swedish. Other texts are in Finnish.

Finnish media statistics' table service /Joukkoviestintätilaston taulukkopalvelu
More information

Statistics Finland is a member of Nordicoms's statistical network, and contributes data to the comparative Nordic media statistics.

Channel Families Dominate the Nordic TV market

TV viewing, TV market | Nordic Countries June 2015

Television viewing is becoming more and more fragmented, but the largest proportion of linear TV viewing is still concentrated to the major TV companies. This is shown in Nordicom's compilations of audience data from the Nordic countries in 2014.

Previous overviews of linear TV viewing in the Nordic countries have shown quite stable viewing in 2014 compared to 2013. Compared to ten years ago, we still watch more linear TV, but the increase in audience that came with the transition to digital terrestrial TV has been broken, and in recent years the curve has flattened.

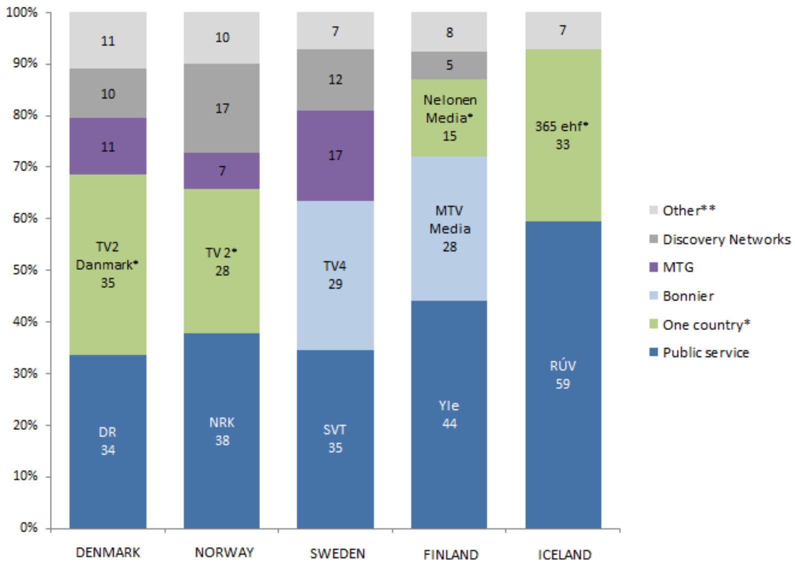
As for the major TV channels' audience shares, they were relatively constant from 2013 to 2014. In a ten-year perspective, however, all major channels have lost viewing, and many quite considerably, but nevertheless, some major TV channels in each country still stand for a considerable proportion of viewing time.

But how is viewing of linear TV in the Nordic countries distributed among the various TV groups? And has there been any change since 2013, or over time?

Channel families dominate

In each Nordic country a few channel families together account for around 90 per cent of the national viewing time. Channels outside these companies share the remaining 10 per cent.

Television broadcasting companies' audience shares in each Nordic country in 2014 (per cent)



* TV 2 in Denmark and Norway, Nelonen Media in Finland and 365 ehf. in Iceland are marked in the same green colour in the graph to indicate that they operate exclusively on one national TV market in the Nordic region, unlike Bonnier, MTG and Discovery Network which operate in several Nordic countries.
Note: Data are based on daily viewing time. Annual averages, except for Iceland week 42.
Sources: TNS Gallup Denmark, the Danish Agency for Culture, Finnpanel and YLE Audience Research, Capacent, Statistics Iceland, TNS Gallup Norway, MMS, Nordicom-Sweden.
Download the full graph in PDF-format.

In Iceland, primarily two domestic companies compete for viewers: public broadcaster RÚV and Iceland's leading private media, 365 ehf., which broadcasts the largest commercial channel Stöð2 and its sister channels. In the other countries, there are four major channel families, respectively: one domestic public service broadcaster, one or two companies built around the major commercial TV channel/s/ in each country, plus MTG and Discovery Networks, which operate in several countries. Over the years, most of these TV groups have bought, sold, started, closed down or changed names and formats of some of their TV channels. But still, the groups are more or less the same and their audience shares remain fairly stable.

Public service TV largest in each country

The original public service companies have kept the greatest audience shares in all countries except for Denmark, where TV2 Denmark is larger than the DR. TV 2 Denmark, which just as DR is owned by the Danish state, broadcasts the commercially funded public service channel TV 2 plus a number of channels without public service obligations. This means that also in Denmark, public service broadcasting has the largest audience share, and with a total of 58 per cent – DR total 34 per cent and TV2's main channel 24 per cent – it reaches the same level as public service in Iceland (RÚV 59 per cent).

DR, YLE and RÚV increased their shares slightly from 2013 to 2014, while SVT remained the same and NRK decreased somewhat. Even over a ten-year period, DR, YLE and RUV have retained their overall market shares (NRK and SVT have, however, lost 5-6 percentage points).

Top Nordic media companies plus Discovery dominate commercial TV

Following closely behind the public service companies are the companies built around the major commercial TV channels that were previously broadcast in the analogue terrestrial networks. Their owners are some of the largest Nordic media companies: Swedish Bonnier owns MTV Media in Finland and TV4 in Sweden, Finnish Sanoma owns Nelonen Media in Finland and Danish Egmont owns the Norwegian TV 2 Group.

The other major television groups are the Swedish MTG/Viasat and American-owned Discovery Networks Northern Europe, both of which broadcast TV channels in several Nordic countries. MTG has its strongest position in Sweden and Discovery Networks in Denmark.

From SBS to Discovery

The channel group that has undergone the greatest changes in recent years is Discovery Networks Northern Europe. The group is the result of Discovery Communications purchase of SBS Nordic from the German ProSieben Sat.1 Group. The takeover led to the merger of Discovery's and SBS' Nordic TV channels into a new company, SBS Discovery Media, which was established in 2013. Since 2014, the group is also the principal owner of the Eurosport channels. The influx of new channels has contributed to greater audience shares for the company. In 2015, SBS Discovery Media changed names to Discovery Networks Northern Europe.

Download tables on TV in the Nordic countries from Nordicom's table database:
Television broadcasting companies' audience shares in 2014. Shares 2004-2014
Public service television audience shares 2004-2014
The five TV channels with largest audience shares in 2014. Shares 2004-2014
The 25 largest media companies in the Nordic Countries 2013

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. All main channels are included, but the number of channels is not the total for every group. Channels not included are mainly small channels (mainly pay-TV). For details, see the tables above.

Sources: Data are compiled mainly from the following institutes and reports
DR Audience Research Department: Media Development 2014 plus previous reports)
Finnpanel: Results from the TV audience measurement
Capacent, Iceland
TNS Gallup Norway: TV-seing 2014 plus previous reports (TV-data in English are presented by medianorway)
Medietilsynet: Eierskap i norske medier (in Norwegian)
MMS: Annual reports (in Swedish)

Suggested reading: The Nordic Media Market 2014 (Nordicom) - for purchase

Swedish Media Output 2014

Media Content | Sweden March 2015

More than two-thirds of the output on the public service channels SVT1 and SVT2 are national productions. Among the commercial channels, half of the TV4 output is of Swedish origin, while the others are dominated by English language productions. The Swedish productions are often placed in prime time. These are some characteristics of the media output, as revealed in a study by the Broadcasting Authority.

The annual report on Swedish media output describes the programming of the major TV channels, plus a selection of certain on-demand services and radio channels for the past year and over time. One aim is to measure the selection and diversity on a number of different TV channels.

Information- or entertainment-oriented TV channels?
The scope of a TV channel is determined by how the supply is distributed across 19 programme categories. Already the three largest categories for each channel indicate an entertainment profile among the commercial TV channels and a more information-oriented approach among the public service channels (SVT).

The three major programme categories for eight channels, share of airtime by channel (per cent)

SVT1	%	SVT2	%	TV3	%	TV4	%
Mixed pgm	16	Other	23	Reality*	22	Mixed pgm	21
Non-fiction, other	15	News	21	Sitcoms	16	TV Series	15
News	11	Non-fiction, other	14	TV Series	15	Feature film	13
Sum	42		58		53		49

Kanal 5	%	TV6	%	Sjuan	%	TV8	%
TV Series	38	Sitcoms	47	Reality*	41	Reality*	42
Reality*	18	TV Series	35	TV Series	23	TV Series	28
Sitcoms	18	Feature films	11	Feature films	9	Mixed pgm	13
	74		93		73		83

Note: Reality corresponds to the category Other reality entertainment. It does not include Docusoaps, which has a category of its own. Source: *Svenskt medieutbud 2014* (p. 23), Swedish Broadcasting Authority (processed).

Considering the total output, Kanal 5, TV6 and TV8 stand out as purely entertainment channels (almost 100 per cent of their content is entertainment). As for the public service channels SVT1 and

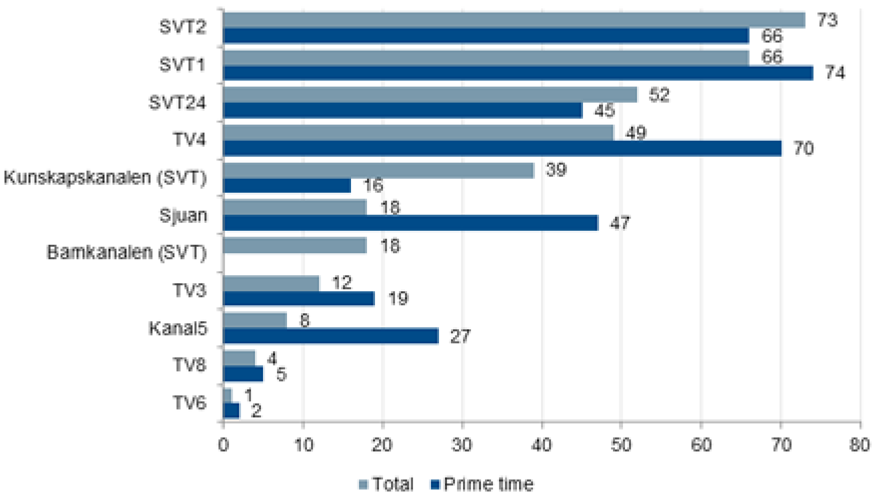
SVT2 combined, the most prominent content is information-oriented (61 per cent information, 39 per cent entertainment and sports). Channel-wise, SVT2 is more oriented towards information (78 per cent of total output) and SVT1 entertainment and sports (52 per cent). The output of the largest commercial channel, TV4, comprises a third information-oriented content and two-thirds entertainment-oriented.

Swedish TV programmes in prime time

The proportion of Swedish-produced programmes on SVT's two main channels is 66 and 73 per cent, respectively. The respective share of Nordic productions, Sweden included, accounts for 77 and 80 per cent. On TV4, almost half of the output has Swedish origin. For other commercial TV channels in the survey, the proportion of Swedish-produced programmes ranges from 1 per cent (TV6) to 18 per cent (Sjuan), while the dominant content is comprised of US and UK productions. Other Nordic programming on the commercial channels is mostly zero per cent.

There is a clear tendency that national programmes are often scheduled for prime time. On TV4, 70 per cent of the supply in prime time is Swedish-produced, and on Sjuan (belonging to the TV4 Group) this figure is 47 per cent.

Swedish-produced TV programmes as share of total output and prime time in 2014 (share of airtime, per cent)



Note: Prime time includes programmes with a start time of 19:00 to 21:59. For Barnkanalen (SVT's children's channel), which broadcast no more than six hours per week in the prime time span, we report the total only.
Source: *Svenskt medieutbud 2014* (p. 24), Swedish Broadcasting Authority.

Sports, non-fiction and reality entertainment on-demand

The purpose of studying the TV channels' on-demand services – the so-called play services – is to compare the range with the offer of the respective TV channel during the same period of time. Only programmes that can be watched free of charge are included in the study, which corresponds to 120 hours/week on SVT Play, 54 hours/week on TV4 Play, 13 hours on TV3 Play and 9 hours on Kanal 5. The Swedish programmes dominate on all four play services; for commercial channels substantially more than their main channel, a reason being limited rights for the retransmission of programmes online.

The main programme areas of SVT Play are sport and factual programming (25 and 22 per cent), while the commercial TV channels are dominated by reality entertainment (two-thirds of the content of Kanal 5 Play and almost half of the supply of TV3 Play). The on-demand services' balance of entertainment and information content corresponds well with the orientation of the TV channels.

Radio broadcasts round the clock
With the exception of SR P1, the surveyed radio stations broadcast 24/7. The commercial radio networks Rix FM's and Mix Megapol's main content is mixed programmes (music interspersed with talk) and music programmes, while the channels of the public service organization Sveriges Radio (SR) have distinctive profiles. SR P1 is dominated by news (33 per cent) and factual programming, SR P2 by classical music and minority programmes, SR P3 by a youth-oriented output in various programme categories, and SR P4 by a local output – a blend of news, talk and music – and sports in the evenings and on the weekends.

Download Svenskt medieutbud 2014 (in Swedish, PDF format)

Background tables from Nordicom's table database (Excel format):
TV channels in Sweden 2014
Radio channels and stations in Sweden 2014

About the survey: The study of Swedish media output is part of the authority's mandate to monitor and report on how programming in the Swedish media is evolving. The aim is to conduct recurring, systematic and long-term scientific studies of the output offered on Swedish television and radio. The reports have been published annually since 1998. Initially the focus was on TV only, but from 2012 the television on-demand services and public service radio are included, and from 2013 also Sweden's largest commercial radio networks, Rix FM and Mix Megapol. All surveys have been conducted by the Department of Journalism, Media and Communication at the University of Gothenburg (JMG) and led by Professor Kent Asp. Reports from 2009 are available on the Authority's website .

The European Market for On-demand Audiovisual Services

Audiovisual Market | Europe April 2015

The European Commission has published a report on the VOD market in Europe, covering both developments of the market and an overview of audiovisual audience measurements in the EU.

In addition to statistics for the year 2014 covering on-demand services established and available in the EU, this report presents five sections covering issues important for understanding the development of the sector and its impact on the wider audiovisual landscape:

- Online advertising in the EU in 2013
- Recent developments of the SVOD market in Europe in 2014
- The proportion and the prominence of European works in VOD catalogues
- The role of providers of VOD services and distribution platforms in the financing of film and audiovisual production
- Measurement of fragmented audiovisual audiences. Particular focus is placed on the availability of time-shifted viewing and television viewing on PCs and on other devices. It also looks into the most recent developments in audience measurements.

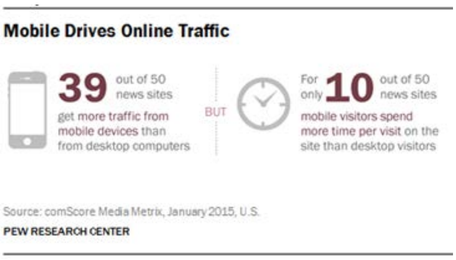
This extensive report (495 pages) is available here (the European Commission's website)

About: This report was prepared within the framework of a contract between the European Commission (DG Connect) and the European Audiovisual Observatory, which has provided the content. The Observatory is a European public service body comprised of 40 member states and the European Union, represented by the European Commission. Among its major activities are the publication of a yearbook, newsletters and reports plus online databases, e.g. the free accessible MAVISE database on TV and on-demand audiovisual services and companies in Europe.

State of the News Media 2015

Media Market | USA April 2015

At the start of 2015, a majority of the top 50 digital news websites in the USA have more traffic to their sites and associated applications coming from mobile devices than from desktop computers, according to Pew Research Center's annual report on the landscape of American journalism.



Parallel to the growth in mobile traffic, desktop visitors to the same sites tend to spend more time per visit than do mobile visitors. For half of the top 50 news sites – which include legacy print, cable, network, international and public broadcasting outlets as well as digital-only entities – visitors from desktops stay longer than those coming through mobile.

The report also shows how the growth of mobile has seen a further rise of the social web. Almost half of web-using adults report getting news about politics and government in the past week on Facebook, a platform on which influence is greatly driven by friends and algorithms. Digital and mobile developments have also broadened the world of audio, where podcast listening is on the rise. But even as mobile and social news habits evolve, legacy platforms have by no means been abandoned, though some are faring better than others.

These are some of the findings of Pew Research Center's 2015 *State of the News Media Report*. This year's study includes 13 data-filled fact sheets, each of which provides the latest audience, economic, news investment and ownership trends for key sectors of news media, from newspapers to cable TV and public broadcasting.

Read more http://www.journalism.org/2015/04/29/state-of-the-news-media-2015/

About the report: *The State of the News Media 2015* is the twelfth edition of an annual report by the Pew Research Center's Journalism Project examining the landscape of American journalism. The entire report is available online. This study also includes a searchable Media & News Indicators database.

The World's Largest Media Corporations, 2015

Media Market | International May 2015

Comcast, Google and Disney are the largest media corporations in the world, according to the list of the 65 largest media corporations, compiled by the German research institute Institut für Medien- und Kommunikationspolitik. Bonnier, from Sweden, is the only Nordic corporation on the list, ranking 57.

Each year, Institut für Medien- und Kommunikationspolitik [Institute of Media and Communications Policy] publishes a ranking of the largest media corporations in the world. They also rank the largest corporations in gaming, online and telecom.

Eight of ten corporations are American

American corporations hold the top rankings on the list for 2015. The largest is Comcast, originally a cable TV operator, which over time has broadened its operations with Internet distribution, on-demand services and telecom. Its merger with NBC in 2011 included businesses such as TV networks, TV channels, production companies and sports teams. The company's revenue for 2014 was €51.7 billion. The second largest corporation on the list is Google (€49.7 billion), while number three is The Walt Disney Company (€35.3 billion).

Top 10 International Media Corporations, 2015

Rank	Corporation	Revenue 2014
1.	Comcast (Philadelphia/USA)	€ 51,769 billion
2.	Google Inc. (Mountain View/USA)	€ 49,681 billion
3.	The Walt Disney Company (Burbank /USA)	€ 35,308 billion
4.	News Corp. Ltd./21st Century Fox (New York/USA)	€ 30,441 billion
5.	DirecTV, LLC (El Segundo/USA)	€ 24,318 billion
6.	Viacom Inc./CBS Corp. (New York/USA)	€ 20,767 billion
7.	Time Warner Inc. (New York/USA)	€ 20,594 billion
8.	Sony Entertainment (Tokyo/JP)	€ 20,169 billion
9.	Bertelsmann SE & Co. KGaA (Gütersloh/GER)	€ 16,675 billion
10.	Apple Inc. (Cupertino/USA)	€ 13,596 billion

Source: Institute of Media and Communications Policy

The ranking is generally dominated by American media corporations: of the ten media corporations with the highest revenue in 2014 eight are American, one has its domicile in Japan (Sony Entertainment, ranking 8), and one in Germany (Bertelsmann, ranking 9). However, let us not forget that the availability of data can also have an impact on the ranking. It was not until the ranking for 2014 that Chinese corporation made it to the list. This was not due to a new corporation having grown large enough; rather, its financial data were finally available. Thus, with a ranking of 15 is Tencent, a Chinese company whose subsidiaries provide media, entertainment, Internet and mobile phone value-added services, and operate online advertising services in China (http://en.wikipedia.org/wiki/Tencent, June 4, 2015). The company's revenue in 2014 was €2.6 billion. Other Chinese companies on the top list are Baidu (ranking 29) and Shanghai Media Group (ranking 59).

Australia nil – Nordic countries one
Looking at the world at large, Bertelsmann SE & Co. KGaA, as mentioned, is the largest media corporation in Europe; the French company Vivendi is the second largest (ranking 29 on the global top list); Brazilian conglomerate Globo Communicação is the largest in South America (ranking 30); and the South African Naspers Group is the largest in Africa (ranking 31). No company from Australia is found within the top-65 ranking.

One media corporation from the Nordic countries has made it to the list: with a turnover of €2.6 billion in 2014, Swedish Bonnier AB ranks 57.

The complete ranking is available here, along with a brief introduction to each company.
Rankings of the largest companies in the world in gaming, online and telecom (in German only)

About: The Institute for Media and Communications Policy (IfM) was founded September 2005 in Berlin as an independent research and counselling centre. The media database mediadb.eu was created at the IfM and is under its supervision. The institute is a non-profit company and does not serve any economic or political aims.

Film and Cinema

Report on Nordic Films Crossing Borders

Film | Nordic Countries June 2015

The number of Nordic titles distributed in neighbouring Nordic countries has steadily grown. But what were the top Nordic film exports in the Nordic region and internationally between 2009-2013 and how successful really was the Millennium film trilogy?

In the report *Nordic Films Crossing Borders* commissioned by Nordisk Film & TV Fond, project researcher Sara Keskinarkaus answers the questions above with hard facts and figures and gives a comprehensive view of Danish, Finnish, Icelandic, Norwegian and Swedish films' abilities to travel. The 47 page report is based on qualitative data collection and desk research and covers more than 800 Nordic titles premiered in 2009-2013.

The perspective of the report moves from the local to pan-Nordic and finally worldwide successes of Nordic film. The report is divided into six chapters. At first, the focus is on the national characteristics of Nordic film. The second chapter is an overview of Nordic cinema trends and a dive to Nordic film successes. Nordic numbers lead to the international successes and more specific analysis of children and youth films and documentary hits.

Read more and download the report

About Nordisk Film & TV Fond: The fund was established in 1990 to promote high quality film and TV productions by allocating funding for Nordic feature films, TV fiction and series, and creative documentaries. The fund is backed by the Nordic Council of Ministers, the five Nordic film institutes and 11 Nordic television channels. To get funding, the project must have a significant audience potential primarily in the Nordic countries and secondarily in the global market. Projects for children and youth are given priority.

World Film Market Trends and Animation in Europe

World Film Market Trends and Focus on Animation are the titles of two new booklets published by The European Audiovisual Observatory.

FOCUS - World Film Market Trends 2015 contains key figures of the film industry in the most important countries. It provides an analysis of results and tendencies country by country, together with recent figures. The series has been published since 1998 by the Marché du film (Cannes, France). Focus is realised by the the European Audiovisual Observatory.
Box office up in the EU in 2014, press release 5 May 2015
The FOCUS World Film Market series (current publications are for purchase only)

Focus on Animation is part of a major research project entitled “Mapping the Animation Industry in Europe” commissioned to the European Audiovisual Observatory by the Creative Europe MEDIA sub-programme of the European Commission. The project aims to track the production volume, distribution and circulation of European animation films and TV works as well as to provide a general overview of the structure of the animation industry.
Free PDF available at the website of the European Commission

Find more facts and figures about Nordic film and cinema

Did you know that national film titles topped the cinema charts in all the Nordic countries in 2014? And that in Finland even four of the five most visited films were Finnish titles? Moreover, did you know that Finland and Denmark had some of the highest national market shares in Europe in 2014? And that, among both the Nordic and European countries, Iceland has the highest number of cinema visits per capita?

Discover more facts about Nordic film and cinema via the links below.

Comparative Nordic statistics
Nordicom’s statistical database gives an overview of the number of cinemas, screens and seats in Denmark, Finland, Iceland, Norway and Sweden. The tables also provide information on the number of premiere films in total and by origin, gross box office in total and by origin, number of cinema visits in total and per capita, etc. Each table links to the national sources.
Nordicom’s media statistics (choose Nordic – Film and Cinema)

National statistics in the Nordic countries
Detailed film and cinema statistics for each market are presented by national film institutes, film funds and statistical producers:
The Danish Film Institute: Facts & figures
The Finnish Film Foundation: Facts & figures
Statistics Finland: Cultural Statistics Table Service
Statistics Iceland: Media and Culture database
Film & Kino: The Norwegian Cinema Market
Medienorway's database (in Norwegian)
The Swedish Film Institute: Facts & figures

Outlook Europe – International: Media policy

European Media Policy Newsletter no. 1, 2015

Media Policy | Europe April 2015

The *European Media Policy* newsletter from Nordicom, provides an up-date on policy developments at the European level. It concentrates on news from the EU – current issues and trends in media policy, new proposals for legislation, debates in the European Parliament, recently taken or impending policy decisions and reactions among those concerned, new support programmes, EU studies in the field, etc. The latest issue (March) gives an overview of some current media questions such as press freedom, net neutrality rules, the TTIP trade deal, a digital single market, copyright rules, and more.

Read the whole newsletter 1-2015 (link to PDF)
Read previous issues and/or subscribe

UNESCO Internet Freedom Series: Countering Online Hate Speech

Freedom of Expression, Internet | International June 2015

***Countering Online Hate Speech* provides a global overview of the dynamics charactering hate speech online and some of the measures that have been adopted to counteract and mitigate it.**

While the study offers a comprehensive analysis of the international, regional and national normative frameworks developed to address hate speech online, and their repercussions for freedom of expression, it places particular emphasis on social and non-regulatory mechanisms that can help to counter the production, dissemination and impact of hateful messages online.

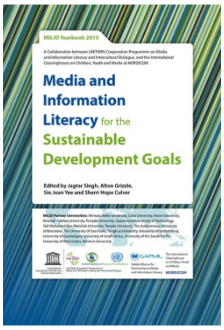
Four main areas of tension arising between the international standards aimed to regulate freedom of expression and the obligations of states and societies to counter or limit hate speech are addressed in the study. It analyses the definition of the hate speech; the jurisdiction of the national governments and the role of transnational companies; the character of hate speech online and its relation to offline speech and action; and it identifies a variety of methods that have been used to address specific and contextual problems.

UNESCO press release 19.06.2015
Download: Countering Online Hate Speech (PDF)
Previous titles in UNESCO Series on Internet Freedom

About: The study has been developed in cooperation with the Programme in Comparative Media Law and Policy (PCMLP) at the University of Oxford. The roots of the study lie in UNESCO's fulfilment of Resolution 52 of its 37th General Conference in November 2013, as agreed by the Organization's 195 Member States. This resolution called for a comprehensive and consultative multi-stakeholder study, within the mandate of UNESCO, on Internet-related issues of access to information and knowledge, freedom of expression, privacy, and the ethical dimensions of the Information Society. The research into hate speech served as a contribution towards the wider study.

Anthologies from Nordicom

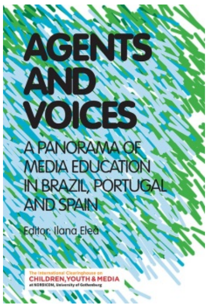
The International Clearinghouse for Children & Media:



MILID Yearbook 2015

The third MILID Yearbook provides a case for media and information literacy as a tool for open and inclusive sustainable development.
The MILID Yearbook 2015 is a joint initiative of the UNESCO-UNAOC University Cooperation Programme on Media and Information Literacy and Intercultural Dialogue (MILID) published by Nordicom's International Clearinghouse on Children, Youth and Media. Available in print and online.

Read more, order or download as free PDF

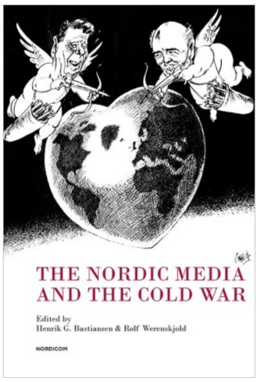


Agents and Voices
A Panorama of Media Education in Brazil, Portugal and Spain

This anthology deals with common aspects in media education shared by the three countries despite cultural, economic and educational differences. In 2014 the Clearinghouse for the first time published a yearbook in Spanish and Portuguese, which is now available in English.

Read more and order

The Nordic Media and the Cold War



The Cold War between the East and West during the period 1945-1991 was a rivalry where the world's doom constantly emerged as a possible result. The Cold War was global and included northern European countries like Sweden, Denmark, Finland and Norway in different ways. Historians are still discussing how Cold War history should be understood in these countries, but they have rarely been concerned about mass media and communications. Meanwhile, many media scholars have neglected the theme entirely. In this book, these two areas of knowledge are combined in new research on the Nordic mass media, and its significance during the Cold War.

A number of controversial topics are covered. Nineteen Nordic scholars sheds new light on Nordic print media in all four countries, but also write about radio and the television broadcasting. Extending the traditional Cold War research on media and communication to include sport, magazines for men, political cartoons, and films, the book lays the foundation for Cold War studies to become an integrated interdisciplinary field of knowledge, and a more central part of the Nordic media research than before - with countless opportunities for exciting new research, with high relevance to world conflicts in our own time. Editors are Henrik G. Bastiansen and Rolf Werenskjold.

Read more and order

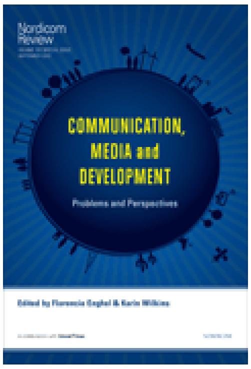
Scientific Journals, Open Access

Nordicom Review special issue 2015

Beyond the Impasse: Exploring New Thinking in Communication for Social Change

This issue of the *Nordicom Review*, edited by Pradip Ninan Thomas, is a result of the boutique conference 'Beyond the Impasse' which was organized by the Centre for Communication and Social Change, University of Queensland in January 2013. The aim was to bring together academics who were involved in pushing the boundaries as it were of communication for social change in terms of theory and methods as they applied to practice.

The whole publication



The publication above should be seen as an extension of **Nordicom Review special issue 2012**, entitled *Communication, Media and Development. Problems and Perspectives*, edited by Floria Enghel and Karin Wilkins.

The core of these two special issues of Nordicom Review is the universal right to communicate, and the importance of expressing many voices to promote more democratic and equitable social development – in brief, the importance of communication for social change.

The whole publication

Nordicom Review 1/2015

The whole publication

Reading tips:
Slow television. A Successful Innovation in Public Service Broadcasting [Roel Puijk]

Why Does the Archbishop Not Tweet? How Social Media Challenge Church Authorities [Stefan Gelfgren]

Nordicom Information 1/2015

Tema: Yttrandefrihet i det fria Norden / Theme: Freedom of Expression in the Nordic Countries

The whole publication (mainly Scandinavian languages)

In English, reading tips:
Public or Secret. Access to Information in the Nordic Countries [Oluf Jørgensen]

Nordicom Information 2/2015

Tema: Medier och kön / Theme: Media and Gender

The whole publication (Scandinavian languages and English)

In English, reading tips:
The Gender Divisions and Hierarchies of the Finnish News Organisations
[Tarja Savolainen & Henrika Zilliacus-Tikkanen]
Women in Journalism. The Situation in Iceland [Valgerður Jóhannsdóttir]
Research Project: Women and Media Industries in Europe [Tarja Savolainen]

Media Trends in the Nordic Countries

Editor: Eva Harrie

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Nordicom is an institution within the Nordic Council of Ministers.

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

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

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