

# Media Trends in the Nordic Countries

Newsletter from NORDICOM

---

No. 3, 2018 (December)

## Content

### Media Use

- Youth and News in a Digital Media Environment [Nordicom, Swedish Media Council] 2
- A Nordic Survey of Cultural Habits Among Children and Youth? [Kulturanalys Norden] 3
- More New Books, but Fewer Frequent Danish Readers [Danish Book and Literature Panel] 4
- Use of Social Media in Denmark in 2018 [Danish Agency for Culture and Palaces] 5
- The Swedes and the Internet 2018 [The Internet Foundation in Sweden] 6
- New Nordic Database for Comparative Statistics [Nordic Council of Ministers] 8

### The Media Market

- The Finnish Media Economy in 2017 [Statistics Finland] 9
- The Icelandic Ad Market in 2017: Newspapers Still on Top [Statistics Iceland] 10
- The Norwegian Media Economy in 2017 [Norwegian Media Authority] 12
- The Swedish Media Economy in 2017 [Swed. Press and Broadcasting Authority, Nordicom] 14
- Expert Meeting on Quality Journalism in the Nordic Region [Nordicom] 16

### European and Global Outlook

- European Media Policy Newsletter no. 3/2018 [Nordicom] 17
- Media Reporting: Facts, Nothing but Facts? [Eur. Audiovisual Observatory] – incl. Finland 18
- Continuing Decline in Global Internet Freedom [Freedom House] – incl. Iceland, Estonia 19
- UNESCO Launches a Model Curriculum for Combatting Disinformation 20

### More Publications from Nordicom, Open Access

- Digital Parenting. The Challenges for Families in the Digital Age [Clearinghouse Yearbook] 21
- Nordicom Review 2/2018 21
- Nordicom Information 2/2018: The Nordic Community in Focus 22

### National Research Journals, Open Access

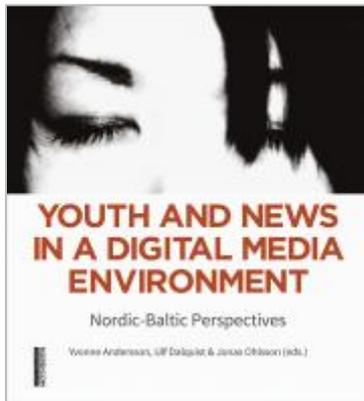
- Media & viestintä 3/2018 23
- Norsk Medietidskrift 4/2018 24

## Media Use

### Youth and News in a Digital Media Environment

Media Use | Nordic-Baltic December 2018 | Nordicom

**Ongoing digitalization has fundamentally transformed the entire media landscape, not least the domain of news. This new book, *Youth and News in a Digital Media Environment - Nordic-Baltic perspectives*, aims to shed light on the implications of these transformations for young people in the Nordic and Baltic countries.**



The blurring of previously sharp distinctions between production, distribution and consumption – caused by ongoing digitalization – has challenged the established news industry and brought into question long-held assumptions of what journalism is or should be, who is a journalist and how we define, consume and use “news”.

**This anthology** from Nordicom and the Swedish Media Council, aims to shed light on the implications of these transformations for young people in the Nordic and Baltic countries. It focuses on three themes: youth participating in news and information production; news production by established media organizations and novel information providers aimed at children and youth; news use among youth.

Taken together, the chapters illustrate the complexity of news use among youth and offer some rather different examples of strategies that news organizations might consider for reaching young people with news – or involving them in the production of news. Furthermore, the book might serve as a basis for reflecting on the urgent, but cumbersome, area of media and information literacy in these media saturated times.

*Youth and News in a Digital Media Environment* consists of contributions from Norway, Denmark, Finland, Sweden and Estonia, written by scholars and people working in the media industry. The target audience of this book is students, professionals and researchers working in the field of journalism, media and communication studies, children and youth studies, media and information literacy and digital civic literacy. The book is edited by Yvonne Andersson and Ulf Dalquist at the Swedish Media Council and Jonas Ohlsson at Nordicom. It has been funded by the Nordic Council of Ministers.

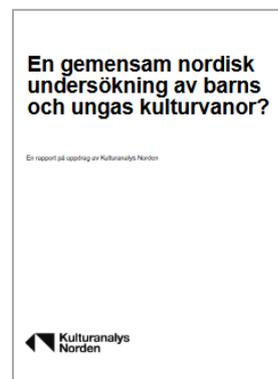
Download the anthology [Youth and News in a Digital Media Environment. Nordic-Baltic Perspectives](#)

**Watch the streamed symposium *Youth and News in a Digital Media Environment*:** On 4 December, 2018, a symposium was arranged by Nordicom and the Swedish Media Council, in connection with the book release. [Watch the symposium here.](#)

# A Nordic survey of cultural habits among children and youth?

Cultural Habits | Nordic October 2018 | EH

**Would it be possible to conduct a joint Nordic survey on the cultural habits and activities of children and young people? This issue is examined in a new report from Kulturanalys Norden, the Nordic Agency for Cultural Policy Analysis.**



In recent years, national surveys have been conducted in the Nordic countries (with the exception of the Faroe Islands, Greenland and Åland), collecting data on cultural habits in the respective population, including the segment children and young people.

**This report** – of which a translated title would be *A Joint Nordic Survey of the Cultural Habits of Children and Youth* – starts by analysing whether the national surveys are comparable on a Nordic level, and finds that, due to differences in scope, methods, age groups, etc., it is not possible to compare data from the surveys of the different countries.

**As for conducting a joint Nordic cultural habits survey**, the report's general assessment is that it would be difficult to bring about political prioritisation of such an initiative in all Nordic countries. One of the reasons for this is that, since the countries already invest resources into measuring cultural habits nationally, it is less attractive to do the same at the Nordic level, and the added knowledge could be perceived as too small in relation to the effort. Neither is it an alternative to switch to surveys on only a Nordic level, as this would mean breaking the national time series.

**In order to increase knowledge** about the cultural habits of children and youth in the Nordic region, Kulturanalys Norden therefore recommends the organisation of a Nordic research seminar focusing on the culture habits of children and young people. The seminar should focus on common Nordic cultural-political issues, and the development of further initiatives and analyses.

[Find the report here \(in Swedish, with a summary in English\)](#)

[Read about Kulturanalys Norden, the Nordic Agency for Cultural Policy Analysis](#)

## ABOUT THE NATIONAL STUDIES

In Denmark, studies on the [population's culture habits \(in Danish\)](#) are carried out with the Ministry of Culture as initiator and financier. The latest report is *Danskernes kulturvaner 2012* [The Danes' Cultural Habits 2012], but results from a new study are [expected by mid-2019 \(in Danish\)](#).

In Finland, data are obtained from Statistics Finland's [time use survey](#) and, as the main source, a [leisure survey](#). The latest leisure survey is from 2002, but new data collection was conducted in autumn 2017 and early 2018.

In Norway, Statistics Norway conducts the annual [Media Barometer survey](#), which is extended every four years to a Media and [Cultural Barometer](#) (the latest data collection is from 2016).

In Sweden, data are obtained from Statistics Sweden's [Living Conditions Surveys](#), the SOM Institute's annual surveys, and the [Swedish Agency for Cultural Analysis' report series](#).

On Iceland, there are no recurring studies of cultural habits, except for regular surveys of media habits (TV, radio, newspapers). The latest broad study, which only covers the population aged 18 and over, was conducted by the University of Iceland in 2009 at the initiative of the Ministry of Education and Culture

Source: *En gemensam nordisk undersökning av barns och ungas kulturvanor?* [A common Nordic survey of children's and youth's cultural habits?], Kulturanalys Norden, 2018.

## More new books, but fewer frequent Danish readers

Media Use | Denmark October 2018 | CR

**The Danes' desire to read continues to change. Today, more fiction than ever is being published, while at the same time, digital media is still progressing. This is according to new figures from the Danish Book and Literature Panel's annual report for 2018.**



In October, the annual report *Bogen og litteraturens vilkår 2018* [Books and Literature Status Review 2018] was published by the Danish Minister of Culture's Book and Literature Panel. The report shows, among other things, that it is among women that reading patterns have changed the most. In the category “Women who read weekly or more frequently” the number fell by 4.5 percentage points from 2014 to 2017.

### *More new books, but fewer frequent readers of fiction*

In the field of fiction, the number of printed releases increased by 58 per cent from 2009 to 2017; it is especially the numbers of novels and children's books that have risen. However, the amount of time dedicated to reading fiction is still decreasing. This development is most pronounced among 30- to 59-year-olds.

### *Digital media and the struggle for consumer attention*

The lower number of frequent readers is due to, among other things, the growing and more complex media supply of the past decade. The time spent on literature reading is under pressure from other offers, such as film and TV streaming services as well as social media.

### *Borrowing of online audio books is on the rise*

In 2017 about 2,000 new online audio books were published in Denmark; this is the highest number registered since online audio books came on the market. In July 2018, 232,453 online audio books were distributed to Danish public libraries, and this is the highest number ever. Among the reasons for the success of online audio books is that they can easily be taken along, and listened to anywhere and at any time.

Read more and download [the 2018 report \(in Danish\)](#)

Find the [previous reports from 2017 \(in Danish\), 2016 and 2015 \(in English\)](#)

Read more [about the Book and Literature Panel in Denmark \(in Danish\)](#)

**The Book and Literature Panel's annual reports** have been published since 2015, and are important reference points for the publishing industry in Denmark. The Danish Minister for Culture, Mette Bock, has decided to [extend the work of the Book and Literature Panel to 2022 \(in Danish\)](#).

The annual reports, based on a large amount of statistics, take the temperature of the book industry from the moment a book is produced until it is in the hands of the reader. Thus, the figures take into account the entire circuit from production, over distribution, to consumption.

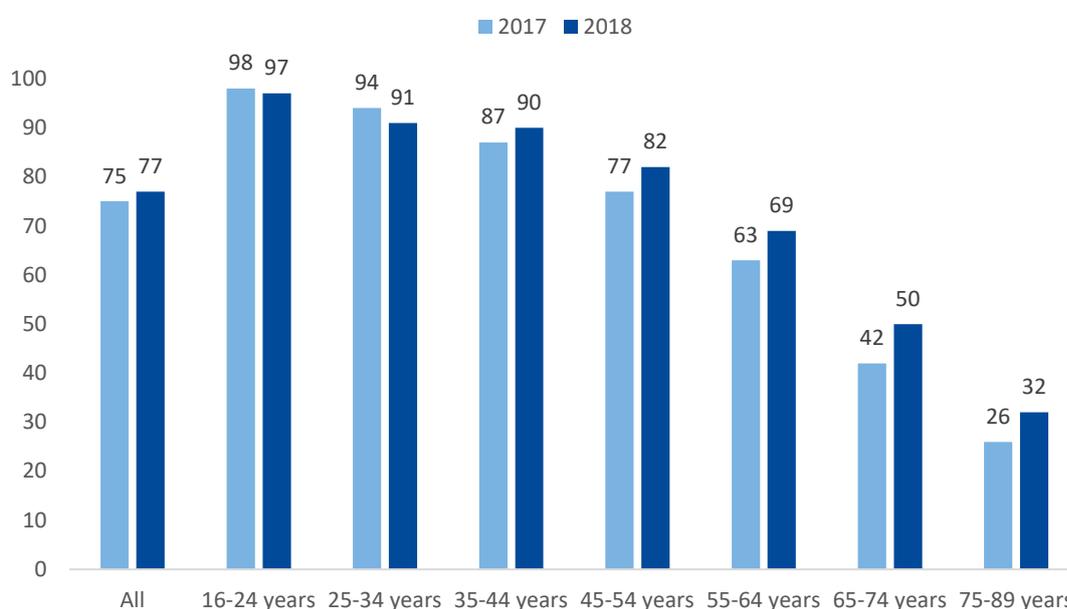
## Use of social media in Denmark in 2018

Media Use | Denmark December 2018 | EH

**From 2017 to 2018, the proportion of the Danish population who use social media has risen slightly. While the proportion of older people using social media has grown, the development among young people has stagnated or decreased slightly, though from a very high level.**

The Danish Agency for Culture and Palaces has published an analysis – a news bulletin survey – focusing on the development of Danes' use of social media in 2018. It shows that among the older population in Denmark, there is an increasing access to social media. From 2017 to 2018, the proportions of social media users aged 65-74 and 75-89 years have increased by 19 per cent and 22 per cent, respectively. Looking at the younger age groups, i.e. persons aged 16-24 and 25-34 years, the shares having used social media in 2018 have stagnated or decreased slightly compared to 2017.

Share of Internet users aged 16-89 years (per cent) who have used social media (created a profile, sent messages, uploaded pictures, etc.)



Social media platforms included in the survey are Facebook, YouTube, Instagram, Twitter, Pinterest, Snapchat, LinkedIn and WhatsApp. | [Source: Brug af sociale medier i 2018](#) [Use of Social Media in 2018]

Analysing the different platforms, the survey shows that, compared to 2017, the proportion of young people using Facebook has stopped increasing. Meanwhile, other major social media platforms, such as Instagram and Snapchat, have either maintained the level of younger age groups or continued to grow. Still, Facebook remains the dominant and most widely used social media platform in Denmark, with over half (53 per cent) of Internet users turning to Facebook on a daily basis. For all other social media platforms included in the survey, respectively, under a fifth of Internet users say they use these platforms on a daily basis.

Read more: [Brug af sociale medier i 2018 \(in Danish\)](#)

**About the study:** This study is a collaboration between Statistics Denmark and the Danish Agency for Culture and Palaces, and is published as part of [the Agency's reporting on media development in Denmark \(in English\)](#). The results are based on 5,850 answers from telephone interviews or web schemas, collected from March to May 2018 among a representative sample of the Danish population aged between 16 and 89.

## The Swedes and the Internet: How Swedes' media habits are changing

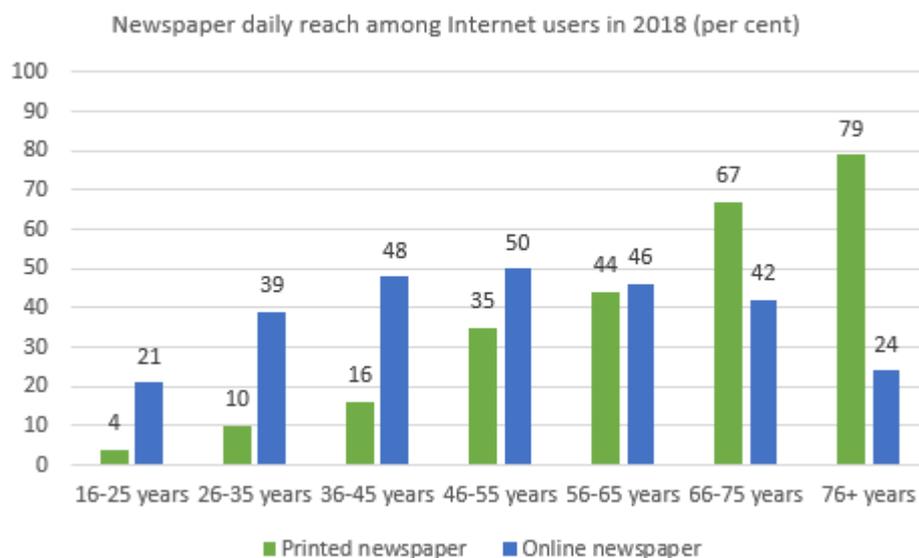
Media Use | Sweden October 2018 | KH

**The use of social media and digital media platforms continues to increase. At the same time, there is a clear gap between different generations, according to the report *The Swedes and the Internet 2018* from the Internet Foundation in Sweden.**

The report, presented in early October, describes Swedes' digital habits and Internet use on a broad scale. Below, we highlight some of the results concerning the use of traditional and digital media platforms among Internet users.

### *Digital newspapers*

An increasing number of Swedes subscribe to a digital newspaper, but this increase is not enough to compensate for the decrease in printed newspaper subscriptions. Moreover, the share of daily readers of digital newspapers is now higher than that of daily readers of print newspapers. Older people hold on to print newspapers to a greater extent than younger people. The age group above 65 years is also the only one in which more than half the group read a print newspaper on a daily basis (see fig. below).

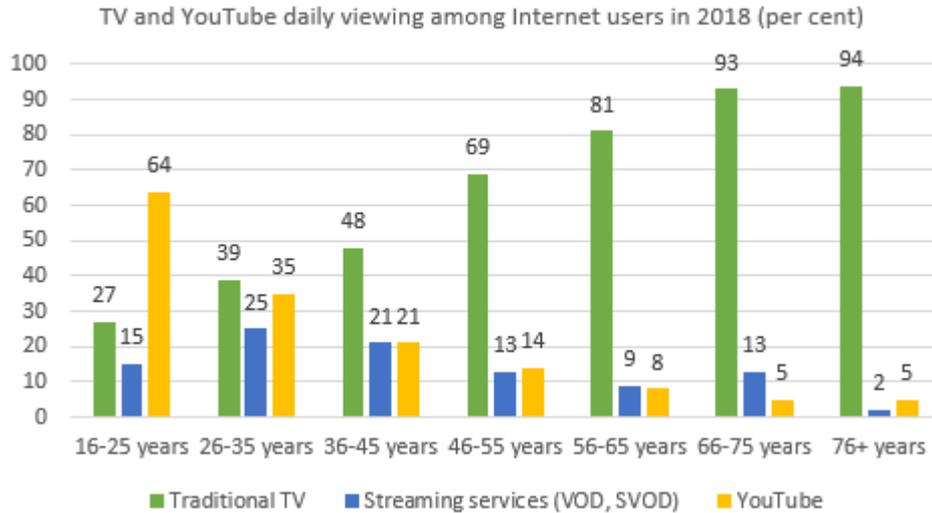


Note: The term Internet users refers to respondents who say in the questionnaire that they use the Internet at least sometimes. | Source: *The Swedes and the Internet 2018*.

### *Platforms for TV and online video*

Traditional TV viewing is decreasing, but still retains the greatest proportion of viewers compared to other platforms. However, more and more people are choosing to watch streaming services online, which means that on-demand viewing is growing at the expense of traditional TV.

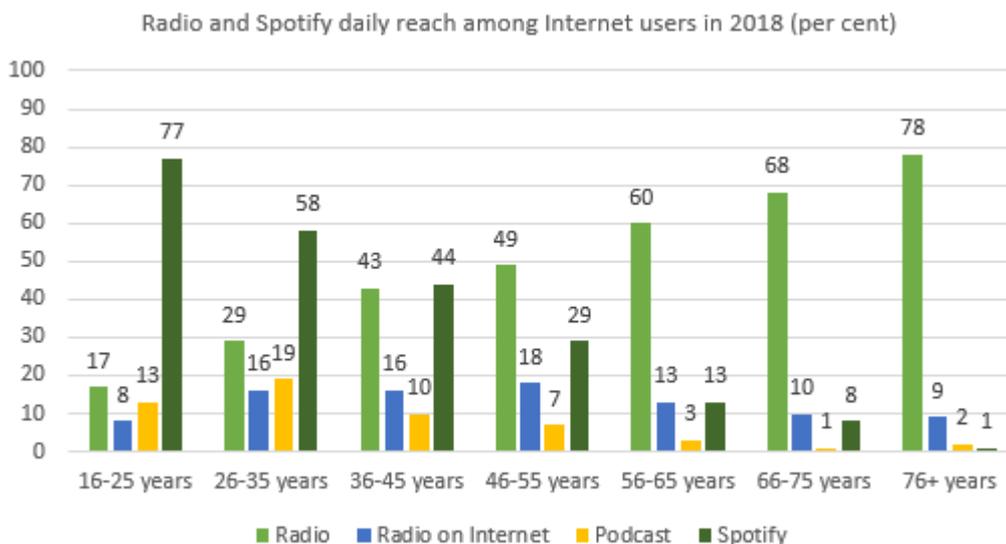
Viewing patterns vary greatly between the different age groups. Almost all Internet users under 45 years watch YouTube; and among 16-25-year-olds, almost two-thirds watch YouTube on a daily basis. People aged 26-45 years watch streaming services more than other age groups, even though the share of those who watch traditional TV is still slightly higher. From the age of 46 years, traditional TV viewing dominates (see figure on the next page).



Note: The term Internet users refers to respondents who say in the questionnaire that they use the Internet at least sometimes. | Source: The Swedes and the Internet 2018.

### Radio and music services on the Internet

Listening to online content is increasing, be it music, podcasts, or online radio. Podcasts and online radio are reaching more than half of Internet users. Spotify dominates among people under the age of 46, and linear offline radio is by far the largest among people over 45. Interestingly, in the age group 16 to 25 years, the proportion listening to podcasts is greater than the proportion listening to a radio station on the Internet (see figure below).



Note: The term Internet users refers to respondents who say in the questionnaire that they use the Internet at least sometimes | Source: The Swedes and the Internet 2018.

Read more: [The Swedes and the Internet 2018, English summary](#) | [Read full report in Swedish](#)

**About the survey:** The Swedes and the Internet is an annual individual survey on Internet use, and was first conducted in 2000. This year's survey lasted from February to April, 2018. The principal for the survey is the [Internet Foundation in Sweden \(IIS\)](#), an independent non-profit organisation that works for a positive development of the Internet. The Swedes and the Internet is the Swedish contribution to the [World Internet Project](#), an international research project that follows the spread and use of the Internet around the world.

## New Nordic database for comparative statistics

Statistics | Nordic December 2018 | CR

**The Nordic Council of Ministers has moved their statistics to a new digital platform, the Nordic Statistics database. Here you can compare statistics from the Nordic countries in many interesting areas, such as culture, education, and gender equality.**

Since the mid-1960s, the Nordic Council of Ministers has collected facts and statistics about the Nordic countries and has published several statistical books. In recent years, the Council has worked to make their online statistical database more user-friendly and flexible.



This work has resulted in a new database, the [Nordic Statistics database](#), containing about 200 matrices. The data are gathered from various national, Nordic, and international statistical sources.

What makes the database flexible is the possibility it offers users to download data based on certain parameters and variables, such as country, year, and gender.

The database contains data in the areas of culture (including cinemas, libraries, books, etc.), education, elections, environment and energy, foreign trade, geography and climate, health, housing and construction, integration and migration, labour market, gender equality, sustainability, population, prices and consumption, public finance, science and technology, social integration and income, business, economy, and agriculture.

[The Nordic Statistics database is freely accessible to all.](#)

In collaboration with OECD, the Council has also created another Nordic statistical database, the [Nordic iLibrary](#), containing indicators based on a selection of the variables from the Nordic Statistics database.



**Each year**, the Council also publishes a pocket yearbook of statistics and infographics about the previous year. To help place the Nordic Region in an international perspective, the latest issue (published in October 2018) has supplemented figures for the Nordic countries and region with international figures.

[Download \*Nordic Statistics 2018\* from Nordpub](#)

More information on the website of the Nordic Council of Ministers

[Nordic Co-operation: Numbers and statistics](#)

[Pohjoismainen yhteistyö: Lukuja ja tilastoja](#)

[Norrænt samstarf: Tölur og tölfræði](#)

# The Media Market

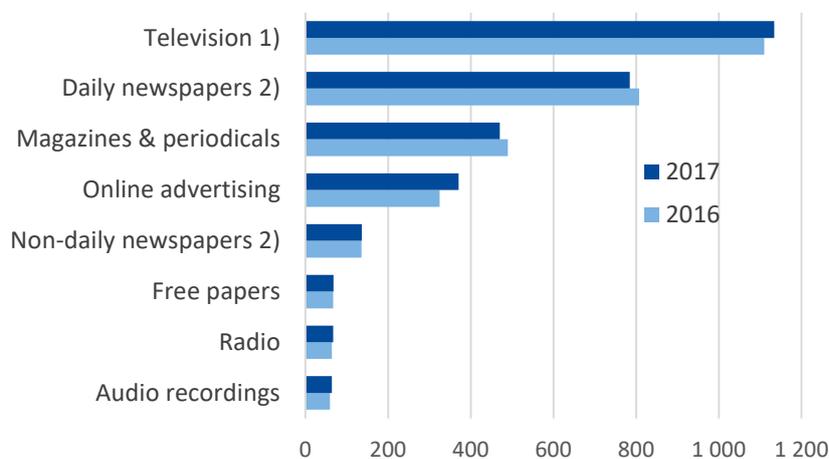
## The Finnish media economy in 2017

Media Economy | Finland November 2018 | EH

**In 2017, for the second year in a row, the value of the Finnish media market showed slight growth. TV, radio and other audio media grew, while newspapers and magazines declined. The strongest growth was in online advertising.**

Last year, the value of the Finnish media market amounted to 3.8 billion euro. This was 53 million euro, or 1.4 per cent, more than in 2016. This is shown in Statistic Finland's annual overview of the Finnish mass media market.

The Finnish Media Market 2016-2017, selected industries (EUR million)



1) Here, the television industry includes the entire activity of the Finnish Broadcasting Company (YLE), TV commercials and subscription fees to TV services, which are basic cable TV fees and pay-TV fees (incl. video on-demand services such as Netflix).

2) Daily newspapers are published 4-7 days/week, non-daily newspapers 1-3 days/week.

Source: Statistics Finland ([click to see statistics for all media industries](#)).

**The largest media** sector is the TV industry, accounting for almost a third (1.1 billion euro) of the total market value in 2017. Compared to the year before, the TV industry revenue increased by over two per cent, boosted by an increase for pay-TV services. At the same time, the volume of TV commercials and their share of TV revenues continued to decline.

The year 2017 was also favourable for radio and other audio media. Radio advertising, which has been increasing for several years, caused commercial radio revenue to grow by four per cent compared to 2016. The market for audio recordings grew by an estimated eight per cent, mainly explained by digital sales. However, both these sectors are relatively small, each representing just under two per cent of the media market.

**The largest increase** was in online advertising, up 14 per cent from 2016 to 2017. In contrast, daily newspapers and magazines continued their nearly decade-long decline. Daily newspapers' revenue fell by almost three per cent, and magazine revenue by more than four per cent, compared to the previous year.

**Despite the slight growth** reported here, the size of the media market has decreased relative to the entire national economy. In 2017 the share of media in the GDP was 1.7 per cent, while it was 2.1 per cent ten years earlier.

[Read more on Statistics Finland's website](#)

[Time series for 1997–2017 are available in Statistics Finland's database](#)

[Lue lisää Tilastokeskuksen kotisivulta](#)

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

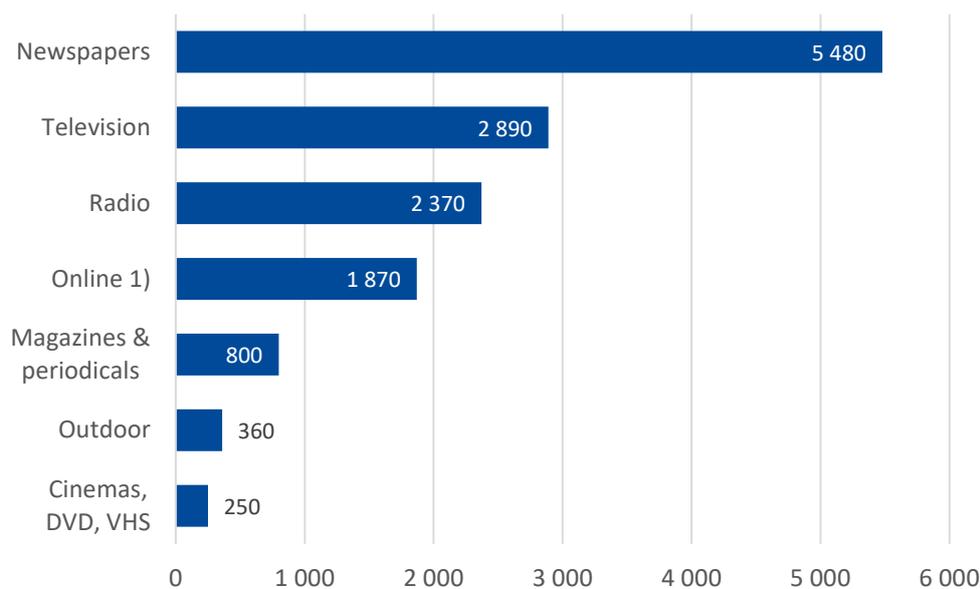
## The Icelandic ad market in 2017: Newspapers still on top

Media Economy | Iceland December 2018 | EH

**In 2017, the Icelandic advertising revenue decreased slightly after a virtually continuous growth in recent years. Newspapers are still the most important advertising medium, retaining nearly 40 per cent of the total advertising revenue.**

Statistics Iceland has released an analysis of the ad market in Iceland. It shows that, in 2017, Icelandic advertisers bought advertisements in the domestic media for 14,020 ISK million (116 EUR million), a slight decrease after a continuous – but slow – growth over the last decade. The media industries' advertising revenues in ISK millions are presented in the graph below.

Advertising revenue in Iceland 2017 (ISK millions)



1) The data do not include advertising on non-domestic websites. | Source: [Statistics Iceland](#).

Roughly three quarters of the ad revenue in 2017 fell into the hands of only five media and telecom companies, which points at a noteworthy concentration of the Icelandic media market.

### *Newspapers still most important*

Despite the changing division of ad revenue shares between media industries – largely at the expense of the print media – print newspapers are still the single most important advertising medium on the Icelandic market, with a 38 per cent share of the total advertising revenue. In second place is television (21 per cent), followed by radio (17 per cent) and online advertising on domestic websites (13 per cent).

In a Nordic comparative perspective, this means that the Icelandic advertising market exhibits a number of special traits; i.e., a substantially larger share of the advertising cake falls into the hands of newspapers and radio, at the same time as online advertising is more limited, compared to its neighbouring Nordic countries.

### *Late development of online advertising*

The weight of the web media as an advertising medium has been limited in Iceland. Since the 2010s its importance in this regard has increased slowly but surely, reaching 13 per cent of the total advertising revenue in 2017. Nearly 80 per cent of the online advertising revenue goes to media's websites, with independents receiving just above 20 per cent.

Advertising expenditure to foreign websites is excluded in these figures. Cautious estimates from Statistics Iceland suggest that, in total, around one fourth to one fifth of Icelandic advertisers' expenditures are on foreign websites (Google, Facebook, YouTube, etc.), which is substantially lower than in the other Nordic countries.

[Read the analysis on Statistics Iceland's website](#)

**About the data:** Statistics Iceland's information about media advertising is derived from annual accounts, and according to information from the [Icelandic Media Commission](#) (Fjölmíðlanefnd) from 2011 and onwards (previously from Statistics Iceland). In instances when information is missing from media operators, advertising revenues are estimated from VAT tax reports. Figures are partly based on estimates. Sponsoring is included.

### **New data on the Icelandic media market to be released in January 2019**



Data on revenues of the Icelandic media market are expected to be released by Statistics Iceland in early 2019.

Meanwhile, [media revenue data for 2016, including time series starting in 1986](#), are available at Statistic Iceland's website.

## The Norwegian media economy in 2017

Media Economy | Norway November 2018 | EH

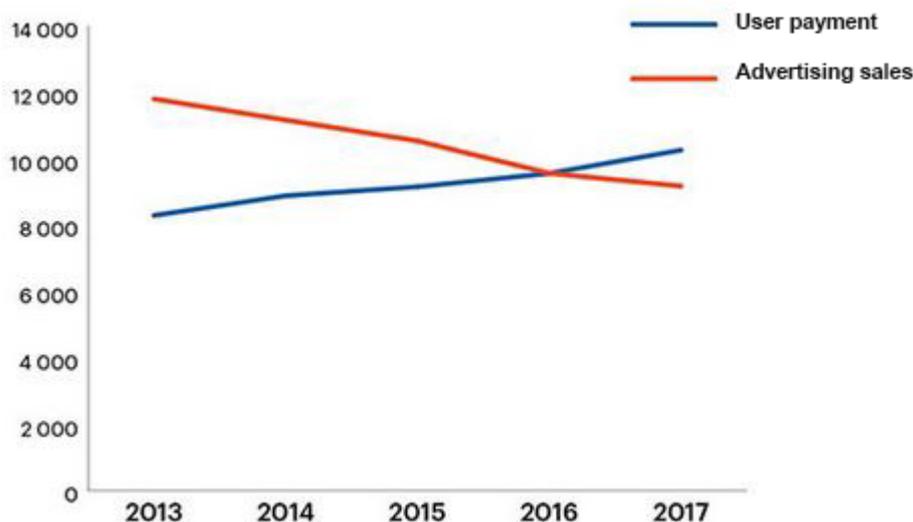
**The Norwegian media industry now earns more on payments from viewers and readers than on advertising sales. This is reported in the Norwegian Media Authority's analyses of the media economy in Norway in 2017.**

In its annual media economy report, the Media Authority analyses the development of newspapers, television and radio in Norway, looking at turnover and profitability at the industry level as well as for individual companies. In 2017, the revenues for Norwegian newspapers and broadcasters amounted to over NOK 26 billion (almost EUR 2.8 billion), an increase of two per cent compared to 2016. Profitability also increased compared to the previous year.

### *User revenues increasingly important*

Of the media industry's two major sources of revenues – advertising sales and user payments – the advertising sales have always accounted for most of the industry's total revenue. This pattern was broken in 2017, however, and for the first time payments from users accounted for most of the money. Behind the shift are increased revenues from TV viewers and newspaper readers, combined with falling advertising revenues for newspapers.

Media revenues distributed on advertising sales and user payments 2013 to 2017 (NOK millions)



Source: [Medieøkonomirapporten 2017 \(page 10\) – link to PDF-report \(in Norwegian\)](#).

### *Growth for commercial TV*

As for the commercial TV industry in Norway, payments from viewers (sales of channel packages and streaming services) and distribution revenues continued to increase in 2017. Moreover, the revenues from TV commercials also continued to rise, despite the ongoing shift in viewing from linear TV to streamed content. The explanation for this, the report suggests, is that the advertisers judge that there is still no better alternative to TV ads for reaching out to their audiences. For the national commercial radio in Norway, advertising revenues fell slightly from 2016 to 2017.

### *Continuing ad losses for newspapers*

The past five years have been dramatic for Norwegian newspapers, with a loss of almost 40 per cent of advertising revenues. In 2017, advertising sales decreased by almost NOK 500 million, or nine per cent. The decline is in print advertising, while the digital advertising revenues in 2017 remained at about the same level as the year before. Due to the long-term decline in ad revenues, payments from readers became the newspaper industry's largest source of revenue already in 2015.

As for newspaper sales to readers, the sales of digital editions constitute a growing share. This development, which has gained momentum in the last three years, is largely due to an increasing number of newspapers having a digital payment model, and the fact that Norway introduced zero VAT for digital editions on par with the print editions in 2016. 2017 was the first time in almost twenty years to see a slightly positive development for the newspaper circulation.

Even though the newspapers' digital revenues are growing, this compensates for only half of the decline in paper-related revenues. Still, in 2017, the newspaper industry was more profitable than the other media industries. The positive result, however, is due to cost cuts, and the Media Authority judges that newspapers' profitability will see continued pressure in the future.

### *Google and Facebook take a large ad share*

A main reason for the decline in newspaper advertising revenues is Google and Facebook taking increasingly larger shares of the Norwegian advertising market. Since 2013, the two global players have increased their market share by 14 percentage points, while the newspaper industry has lost the corresponding share, according to the report.

In 2017, a total of NOK 9 billion was invested in Internet advertising in Norway. The Norwegian Media Businesses' Association (Mediebedriftene) estimates that around NOK 4.2 billion, or almost half of the online advertising investments in Norway, went to Google and Facebook.

[Read more about the report \(in Norwegian\)](#)

[Read the report online \(in Norwegian\)](#)

[Download the report in PDF-format \(in Norwegian\)](#)

**About the report:** *Medieøkonomirapporten 2017* [The Media Economy Report 2017] is the Norwegian Media Authority's annual report on the media industry's economic development, with a focus on news and current-affairs media. Included are paid-for newspapers, national TV and radio, plus local TV and radio and free papers. Foreign pay-TV services (such as Netflix and HBO) are not included. This year's report looks at developments over a five-year period, from 2013 to 2017. The report is published in Norwegian. Read [about the Media Authority in English](#).

# The Swedish media economy in 2017

Media Economy | Sweden November 2018 | UF

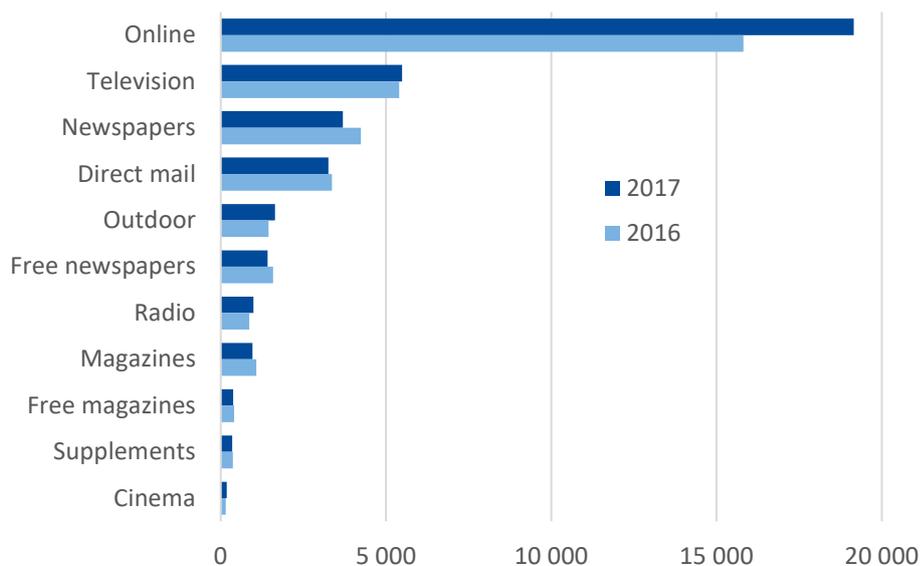
**The Internet is about to become the main playing field for media companies. An analysis of the Swedish media companies' economy in 2017 shows the competition between media companies and media branches in Sweden – and not least the competition between Swedish media and global online networks.**

*Medieekonomi 2018* [Media Economy] is an annual report on the media industry's economy, published by the Swedish Press and Broadcasting Authority. The author of the report is Jonas Ohlsson, Nordicom.

## *Every second advertising krona spent is online*

In accordance with the overall economic situation, 2017 was a prosperous year for media companies in Sweden. Among other things, the GDP showed good growth, the unemployment rate decreased, and households' disposable income increased. Investments in the Swedish advertising market increased by almost eight per cent from the previous year, and the total advertising sales were the highest ever at SEK 37.6 billion (EUR 3.9 billion). The online advertising sales accounted for over half of the total advertising investments, equivalent to just over SEK 19 billion, and for almost all the growth. However, almost two-thirds of the online advertising investments went to global players such as Google and Facebook.

Advertising in Sweden 2016-2017 (SEK million)



Source: The IRM Institute for Advertising and Media Statistics.

## *Different developments for television and radio*

The Swedish commercial TV market consists of three major players, and the commercial radio market of two. In linear television and radio, public service companies SVT and SR are the largest companies in terms of market shares. In 2017, 37 per cent of audiences' time spent on traditional television viewing was devoted to SVT, while SR's share of radio listening was 77 per cent.

The transition to a larger proportion of media consumption online means that the concepts of 'radio' and 'TV' become more blurred. In Sweden today, Netflix is the market leader in user-funded online TV. On the advertising market, YouTube has a corresponding strong position. However, the Swedish television industry is not an industry in crisis; both TV4 and MTG's TV business have profitable operations on the Swedish media market.

While there was a modest increase in TV commercial sales in 2017, sales of radio commercials increased by 14 per cent to an all-time high of SEK 985 million. At the same time, radio's share of the overall advertising market was three per cent, while the equivalent for linear television was 15 per cent.

### *Daily newspapers fighting for ads and audiences*

Newspapers comprise the media sector most affected by competition on the media market. In 2017, newspaper companies' aggregated revenues dropped by almost eight per cent. The industry's total turnover was just over SEK 15 billion, which means that the newspapers have lost about 30 per cent of their revenues over the past ten years.

The main explanation for declining revenues is decreased advertising sales. The growth in newspapers' digital advertising sales (+6%) did not compensate for the decline in print advertising sales. In 2017, Swedish newspaper companies in total sold digital advertising for around SEK 2 billion. Evening papers Aftonbladet and Expressen accounted for more than half of the newspaper industry's digital advertising revenues.

As advertising revenues have decreased, investments in gaining digital audience revenues have paid off. However, even though the growth in paying digital subscribers was strong in 2017, this does not make up for the losses due to decreased subscriptions to printed newspapers.

### *Spotify is No. 1 in revenues and No. 1 in losses*

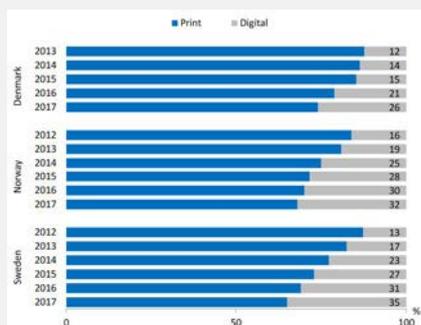
Since 2016, Sweden's largest media company is Spotify. With revenues in 2017 of SEK 39.4 billion, and an operating loss of SEK 3.6 billion, this simultaneously makes Spotify the largest media company as well as the one reporting the greatest losses. The second largest media company, Bonnier, also made losses in 2017. The other three top-ranked media companies in Sweden were Modern Times Group (MTG), the public service group (with SVT, SR and UR), and Com Hem.

[Read more and download the report \(in Swedish\)](#)

[Download the full report in PDF-format \(in Swedish\)](#)

**About the report:** The data in *Medieekonomi 2018* [Media Economy 2018] consist primarily of information from the media companies' official accounts for the 2017 fiscal year. *Medieekonomi* is an annual report, published since 2016 by the Swedish Press and Broadcasting Authority. .

## Newspaper economy in 2017 – updated Nordic statistics



Graph: Ad revenue breakdown in print and digital sales 2012-2017 (%)

**Nordicom's table database** provides comparative Nordic media statistics, presented in English. Tables and graphs include three to five countries, depending on access to national data.

**The basic tables** for Nordic newspaper economy in 2017 show that:

- Newspaper revenues continue to fall in all Nordic countries.
- For a couple of years now, revenues from newspaper sales have contributed to a larger share of the newspaper revenues than advertising sales.
- The digital shares of total revenues, as well as of advertising revenues, continue to grow.

**To find the tables above** [in the database](#):

Choose the categories Nordic – Newspapers – Economy

# Expert meeting on quality journalism in the Nordic region

Journalism, Media Market | Nordic November 2018 | EH



**The Nordic news media are under pressure, as are the resources for journalism. In this context, how can the increasingly important quality journalism be supported in the Nordic countries? This was the theme of an expert meeting, which can be streamed from Nordicom's website.**

How can the Nordic collaboration help support the continued existence of strong and independent quality journalism in the Nordic region, particularly in times of political elections? What can be done to improve and support the collaboration and knowledge exchange within and between the news media sectors in the Nordic region?

These were the two main questions in focus as Nordicom and the Nordic Council of Ministers organised an expert meeting in November on the future of quality journalism in the Nordic region.

The meeting participants included researchers, practitioners, and representatives of industry organisations from across the Nordic and Baltic countries. The outcome of the expert meeting will guide the Nordic Council of Ministers in its continued efforts to support quality news media in the Nordic region.

[Watch the Expert Meeting on the Future of Quality Nordic Journalism](#) here (programme below).

**11.10-12.30: 1. Research perspectives**

- Mark Blach-Ørsten, professor, Roskilde University
- Helle Sjøvaag, professor, University of Stavanger
- Johan Lindell, PhD, senior lecturer, Karlstad University
- Malin Picha Edwardsson, PhD, senior lecturer, Södertörn University
- Henrik Ekengren-Oscarsson, professor, University of Gothenburg

**12.30-13.10: Lunch**

**13.10-14.40: 2. Best practice examples**

- Marius Tetlie, executive editor, Norwegian public service broadcaster *NRK*
- Anna Careborg, head of premium content and digital storytelling, Swedish national daily *Svenska Dagbladet*
- Stig Finslo, vice president communications, Norwegian local newspaper group *Amedia*
- Nellija Locmele, editor, Latvian weekly newspaper *Ir*
- Þórður Snær Júlíusson, editor-in-chief, Icelandic digital newspaper *Kjarninn*

**14.40-15.00: Coffee break**

**15.00-16.30: 3. Cross-industry collaborations and external perspectives**

- Noora Alanne, director, *Finnish Media Federation*, exec. director, *Media Industry Research Foundation of Finland*
- Randi S. Øgrey, CEO, The Norwegian Media Businesses' Association, *Mediebedriftene (MBL)*
- Lars Werge, president, Danish Union of Journalists, *Dansk Journalistforbund*
- Anni Lintula, chief business officer, Finnish magazine publisher *A-lehden*
- John Frølich, director, *Nordic Journalist Center*, Aarhus

**16.30-16.45: Concluding remarks**

**NORDICOM**  
Nordic Information Centre for Media and Communication Research

**Nordic Council of Ministers**

# European and Global Outlook

## European Media Policy Newsletter no. 3, 2018

Media Policy | Europe November 2018 | AC



**This year's third issue of Nordicom's newsletter European Media Policy is out. The newsletter provides an update on policy developments at the European level, concentrating on news from the European Union.**

Some of the contents in this November issue:

- **With EU Parliament** elections coming up soon fears about the spread of disinformation and election meddling have reached frenzied levels in recent months. EU policymakers are grappling with the issue.
- **The tech giants** seem to have lost their glamour. At least in the eyes of EU regulators, human rights groups and other critics who have come down hard on them lately.
- **Public broadcasters** are in the doghouse too. In several European countries they have faced or been threatened with budget cuts and restrictions coupled with new demands on their programming.
- **The established** media (and their journalists) are not very popular either among certain groups. Who are these people and why do they feel this way? Press analysts and media scholars give some answers.
- **The EU copyright** reform provided high drama in the European Parliament this summer. Publishers, authors and artists seem to have won the war. But the battle is not over yet.

Download [European Media Policy 3/2018 \(PDF\)](#)

Read [previous issues of the newsletter](#)

Welcome to [sign up for a free subscription here](#).

# Media reporting: facts, nothing but facts?

Fighting Disinformation | Global November 2018 | EH

**What rules and initiatives exist to help ensure the accuracy and objectivity of news and current affairs reporting? A new report maps the regulatory framework on the European level and in eleven countries, including Finland.**



In *Media reporting: facts, nothing but facts?*, the European Audiovisual Observatory provides an overview of how the principles of accuracy, objectivity and fairness in news and current affairs reporting are regulated at European and national levels, as well as how they are applied by European and national media organisations.

**As for European law**, the report describes how the European Court of Human Rights watches over and applies the European Convention for the Protection of Human Rights and Fundamental Freedoms. Hereby it has established a comprehensive case law related to the media field, and the report points to a number of legal cases – including examples from Denmark and Iceland – in which the Court has reviewed national decisions on Article 10 of the European Convention, which addresses freedom of expression.

**Examining European standards** and policy, the report looks at the Council of Europe, which has made over 80 recommendations and resolutions relating to media since 1970, concerning, e.g., media ethics, public service media, the right to reply, and defamation of people featured in the media. Further, the report also looks at the codes of conduct adopted by professional media interest groups, such as the European Federation of Journalists, the Ethical Journalism Network, and the Alliance of Independent Press Councils of Europe (and internationally, the International Federation of Journalists).

**In the country chapters**, national experts focus on the national rules and legal instruments concerning accuracy and objectivity in broadcast, print and online media in their respective countries. In addition to Finland, the chapters cover the UK, Ireland, Germany, the Netherlands, France, Italy, Spain, Poland, Russia, and Slovakia.

**The Finnish chapter** includes, e.g., the Law on Freedom of Expression in Mass Communication, the Criminal Code, and the self-regulating media system, the last of which is conducted through the Finnish Council for Mass Media. The report also describes the Council of Mass Media's Responsible Media campaign, which in 2018 created a brand (in Finnish) that can be used by media that follows journalistic rules. The chapter is written by Anette Alén-Savikko, University of Helsinki/University of Lapland.

The report concludes with a summary of the Council of Europe's most recent actions in this field, for example its latest Resolution, adopted in April 2018, which concerns the protection of editorial integrity.

[Read more and download the report](#)  
[More reports in the IRIS Special series](#)

**The European Audiovisual Observatory** is a public service body providing information on the various audiovisual markets in Europe and their financing, as well as analyses and reports on the legal issues affecting the different sectors of the audiovisual industry. The Observatory is part of the Council of Europe in Strasbourg, France, and is comprised of 40 member states and the European Union, represented by the European Commission. [Read more](#)

# Continuing decline in global Internet freedom

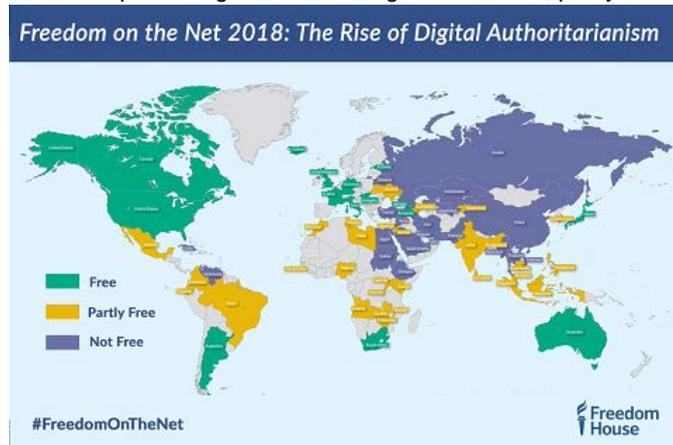
Freedom of Expression | Global November 2018 | EH

**In 2018, Internet freedom declined for the eighth consecutive year, according to the annual assessment by Freedom House. Worst is the situation in China, while Iceland and Estonia top the list of countries with high Internet freedom.**

The Internet is becoming less free around the world. In the past year, freedom online decreased in 29 of the 65 countries assessed in the *Freedom on the Net 2018* report, compared to 19 countries showing improvement. This means that among Internet users, around half (47 per cent) live in countries where the surveillance powers of the authorities increased in the past year, threatening user rights to privacy.

About as many live in countries where individuals have been attacked or killed for their online activities (48 per cent), or in countries where political, social, or religious content was blocked online (55 per cent). Only two of ten Internet users (20 per cent) live in countries Freedom House categorises as ‘free’ in relation to the Internet.

Global map showing countries categorised as free, partly free and not free by Freedom House



Source:  
[Freedom on the Net 2018](#),  
Freedom House

**Contributing to the negative** development is the Chinese model of an extensive censorship and surveillance system, which is being embraced by more countries, with training provided by Chinese officials. Other worrying trends include the increasing disinformation and propaganda being used by authorities as a pretext for further Internet restrictions, and the unbridled collection of personal data, which has broken down traditional notions of privacy.

**Iceland and Estonia**, the only two countries in the Nordic and Baltic area included in the study, together top the positive end of the list. Their populations' high Internet use, as well as steps to strengthen e-governance initiatives, are some features highlighted in the country reports. At the opposite end of the list, China is noted as the worst abuser of Internet freedom in 2018, followed by Iran, Ethiopia, and Syria.

[The full report is available here](#) | [Country report for Iceland](#) | [Country report for Estonia](#)

**About the report:** *Freedom on the Net 2018* covers 65 countries – accounting for almost 90 per cent of Internet users worldwide – in six regions around the world. The countries were chosen to illustrate Internet freedom improvement and decline in a variety of political systems. The numerical ratings and reports include a focus on developments between June 1, 2017 and May 31, 2018. Read more [about Freedom House](#)

# UNESCO launches a model curriculum for combatting disinformation

Fighting Disinformation | Global September 2018 | MJ

**How to teach journalism in the digital era and, in particular, how to make disinformation part of the curriculum? UNESCO has now introduced a new model curriculum with practical lessons and exemplary assignments to show how disinformation can become part of course syllabi in journalism education.**



In seven chapters, the *publication Journalism, 'Fake News' and Disinformation: A Handbook for Journalism Education and Training* addresses the importance of trust, defines the concept disinformation and related concepts mis- and mal-information (with a strong rejection of the term 'fake news'), and the spread of disinformation in social media.

The handbook also provides tools and practices for fact-checking and data verification, as well as dealing with the online targeting of journalists and sources. Every chapter, called as a module, contains a framework and a lesson with assignments.

According to UNESCO, the publication is a call for action. Journalism needs to proactively detect and uncover new cases and forms of disinformation, and this is mission critical for the news media.

The model curriculum is part of UNESCO's initiative in supporting journalism education within its [International Programme for the Development of Communication \(IPDC\)](#). UNESCO has earlier published three model curricula: *Teaching Journalism for Sustainable Development: New Syllabi* (2015), *Model Curriculum for Journalism Education: A Compendium of New Syllabi* (2013), and *Model Curriculum on Journalism Education* (2007).

Besides journalism educators, groups of users who may benefit from the publication are, according to UNESCO, practicing journalists and editors, political parties, health professionals, business people, researchers, and election monitors.

Read more:

Download the report: [Journalism, 'Fake News' and Disinformation: A Handbook for Journalism Education and Training \(PDF\)](#)

[Background information on the publication by UNESCO](#)

[UNESCO Series for Journalism Education](#)

[UNESCO's Global Initiative for Excellence in Journalism Education \(PDF\)](#)

**The contributors of the publication** include *Magda Abu-Fadil* (Director of Media Unlimited), *Fergus Bell* (founder of Dig Deeper Media), *Hossein Derakhshan* (Fellow at Shorenstein Center at Harvard's Kennedy School), *Cherilyn Ireton* (director of the World Editors Forum within the World Association of Newspapers and News Publishers WAN-IFRA), *Alexios Mantzarlis* (leader of the International Fact-Checking Network at the Poynter Institute), *Alice Matthews* (news journalist at the Australian Broadcasting Corporation ABC), *Julie Posetti* (Senior Research Fellow at the Reuters Institute for the Study of Journalism at the University of Oxford), *Tom Trewinnard* (Programme Lead on Meedan's open source verification toolkit Check), and *Claire Wardle* (the Executive Director of First Draft).

## More Publications from Nordicom, Open Access

### Yearbook 2018: Digital Parenting

Anthology | International November 2018 | CB

***Digital Parenting. The Challenges for Families in the Digital Age* is the Clearinghouse Yearbook of 2018. The book addresses the challenges and opportunities faced by parents in digital times taking into account multiple levels of digital penetration among families from different social classes and regions across the world.**



The book is organized along three sections: Digital parenting in context; Parental mediation in practice; and Challenges, risks and opportunities of digital media for parents and children. The articles illustrate the diverse opportunities, constraints and tensions that digital media pose to parenting and family life, encourage further debates, and suggest future policies. As all Yearbooks, the 2018 edition reaches out to a variety of readers, including professionals in the field as well as NGOs and other policy makers.

Editors are Giovanna Mascheroni, Cristina Ponte & Ana Jorge.

[Read more and download the publication](#)  
[Find the previous Clearinghouse Yearbooks](#)

### Nordicom Review 2/2018

Nordicom Review | Nordic December 2018 | EH

**Nordicom's journal *Nordicom Review* is a traditional scientific journal in English, applying double-blind peer-review, and is issued twice a year. This year's second issue, which includes eight research articles (and book reviews), is now available for download on Nordicom's website (open access).**



Some examples of the articles in Nordicom Review 2/2018 (länkar till pdf):

- [Data Visualization in Scandinavian Newsrooms. Emerging Trends in Journalistic Visualization Practices](#) [Martin Engebretsen, Helen Kennedy, Wibke Weber]
- [Local Newspapers, Facebook and Local Civic Engagement: A Study of Media Use in Two Norwegian Communities](#) [Malene Paulsen Lie]
- [“Media Micro-Generations”. How New Technologies Change Our Media Morality](#) [Stina Bengtsson, Bengt Johansson]

[Find all the articles in Nordicom Review 2/2018](#)

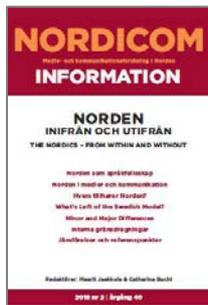
The articles in Nordicom Review are [published online first](#) – see the latest articles [here](#)

[Welcome to publish with Nordicom Review!](#)

## Nordicom Information 2/2018: The Nordic community in focus

Nordicom Information | Nordic December 2018 | Nordicom

This new issue of the journal *Nordicom Information* deals with the Nordic community, with a focus on communication and language. Nordic cooperation has a long history and, according to many, the Nordic affinity is needed more than ever in today's world. However, at the same time, the Nordic model is losing some of the characteristics it once had: English is now more commonly used, the role of public service is decreasing, and there is less political consensus on the Nordic values.



This issue of *Nordicom Information* deals with visions for the future concerning Nordic collaboration; and how Nordic actors view the relevance of the Nordic countries in their activities today. This journal also includes Icelandic and Sámi contributions: about the Icelanders' position in relation to the Nordic language community; and the media output for Sámi children and youth. Other contributions deal with inter-Nordic language comprehension, which can no longer be taken for granted; and the position in Finland of the Swedish language, which is the country's second official language but has been facing some political headwind.

**This will be the last issue** of *Nordicom Information*. In future, the communication concerning media and communication research will be conducted in other ways.

“In today's digitalised society, there are many other possibilities to spread information to larger audience and to analyse, reflect and debate upon new Nordic media research. At this point, we do not know what forms our communication and cooperation will take on, but one thing is for sure: the meaning and relevance of the Nordic interaction will not decrease,” writes Editor Maarit Jaakkola in the issue's introduction.

The issue is mainly written in the Scandinavian languages, but there are also contributions in English.

[Read the entire issue here](#)

[Read the full article about Nordicom Information 2/2018](#)

**Nordicom Information was founded** in 1979 and published as a news leaflet with reviews of Nordic research fields, and was later developed into a scientific journal. In 2010, the format was changed to that of an academic journal, with thematic issues for a more general audience. The editors of Nordicom Information have been Ulla Carlsson, Ingela Wadbring, and Maarit Jaakkola.

# National Research Journals, Open Access

## Media & viestintä 3/2018

Research Journal | Finland October 2018 | CR

**This year's third issue of the Finnish research journal *Media & viestintä* has been published. Among other things, this issue deals with journalism's interpretation of economic policies, the ideological debate about refugees, and co-creation in television.**



*Media & viestintä 3/2018* contains an editorial about environmental science and the ecological footprint left by scientists due to their extensive travel by plane. This issue also contains three articles. The first article examines how journalism has interpreted austerity and economic policies, according to *The Economist*. The second article investigates the ideological discourse used in the Finnish online magazine *MV-lehti* (WTF-magazine), which is known for being controversial and against mainstream media in Finland. The final article investigates television professionals' current practices in using citizen volunteers.

The journal also contains an analysis on fact checking, an introduction to Jürgen Habermas' book *The Structural Transformation of the Public Sphere*, and two book reviews, including *Picturing the Cosmos: A Visual History of Early Soviet Space Endeavour*.

The articles are written in Finnish, but English abstracts are available.

[Read \*Media & viestintä\* 3/2018 here](#)

**Media & viestintä** is a peer-reviewed scientific journal for Finnish media, communication and journalism research, published by the Finnish Association for Media and Communication Studies (Mevi). The content is in Finnish, with English abstracts for the reviewed articles. It is published four times a year.

### New Nordicom Review article about journalism and journalists in Finland

In November, a new Nordicom Review article was published (online first), titled:  
*Experiences of External Interference Among Finnish Journalists. Prevalence, methods and implications.*

The article sheds light on how different external actors try to influence journalism and journalists in Finland. On Nordicom's website, [the author Ilmari Hiltunen answers a few questions about the findings.](#)

## Norsk medietidsskrift 4/2018

Research Journal | Norway December 2018 | BH

**This year's fourth issue of Norsk Medietidsskrift is now available. This issue contains three articles covering different aspects of the comprehensive digitisation process the media are undergoing. How does the conversion from print newspapers to "digital first" work? What happens to the small interpersonal contact points in everyday life when digital services take over? And how can mediatisation be employed to study both historical transformations and contemporary phenomena?**



**This issue's editorial** begins by noting that newspapers' total circulation is increasing for the first time since 1997. Free online news content has long been taken for granted, but now increasingly more people have to pay for digital news content – or are they simply growing accustomed to it? Thus, the increasing circulation is partly due to these new digital subscribers being counted as "circulation". The story of the last two decades will be about dramatic cutbacks and a gradual deterioration of the societal mission. However, it will also be a story about innovation, new forms of communication, and new interactions with the audience.

**The first article** deals with one aspect of this conversion process. Aina Landsverk Hagen, Ingrid M. Tolstad, and Arne L. Bygdås write about the change "From deadline to flowline: A step by step analysis of real change in a Norwegian media organisation". In this study of the local newspaper Moss Avis, the authors employ action research to explore how the mentality has changed in the transition from print to "digital first".

**In the second article**, Lene Pettersen writes about "Digitalisation: Modernity's Removalist". Initially, studies of mediatisation focused on how television influenced the audience, but today the dynamics between people, new media, and society go much further. For instance, this is being noticed in how digital services and social media are displacing the many small, informal points of contact between people.

**The third article**, written by Malene Lie, deals with "The Significance of Media in Retrospect: Mediatisation as historical transformation and the study of contemporary phenomena". Lie explores how the perspective of mediatisation can be applied to the study of societal change. How, for instance, do elderly people reflect on their use of media, and how has this use changed throughout their long lives?

This issue's **guest commentator** is Svein Brurås, who debates the difficult balance between theory and practice in media education. The industry's call for more practice is pushing universities to act more like vocational schools. At the same time, this raises the question of the worth of theoretical knowledge for tomorrow's journalists.

**Bonus material** comes in the form of an essay by Lars Nyre and Gunnar Liestøl, who write about "Public education on the beach with a smartphone in your hands". They experiment with Liestøl's app, which enables those who bring their smart phone to Omaha Beach in Normandy to relive the battles as they were fought at the time they took place.

The articles are in Norwegian, with short English summaries.

[Read Norsk Medietidsskrift 4/2018 here](#)

## Media Trends in the Nordic Countries

**Editor:** [Eva Harrie](#)

**Contributors to this issue:**

Anna Celsing (AC)  
Balder Holm, Nordicom-Norway (BH)  
Catharina Bucht, Nordicom (CB)  
Cecilie Ravik, Nordicom (CR)  
Eva Harrie, Nordicom (EH)  
Karin Hellingwerf, Nordicom-Sweden (KH)  
Maarit Jaakkola, Nordicom (MJ)  
Mia Jonsson Lindell, Nordicom (MJL)  
Ulrika Facht, Nordicom-Sweden (UF)

**Publisher:**

NORDICOM  
University of Gothenburg  
E-mail: [info@nordicom.gu.se](mailto:info@nordicom.gu.se)  
[www.nordicom.gu.se](http://www.nordicom.gu.se)

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.

## Follow Nordicom Online

[News](#)

[Further Reading \(links\)](#)

[Publications from Nordicom](#)

[Subscribe to Newsletters](#)

