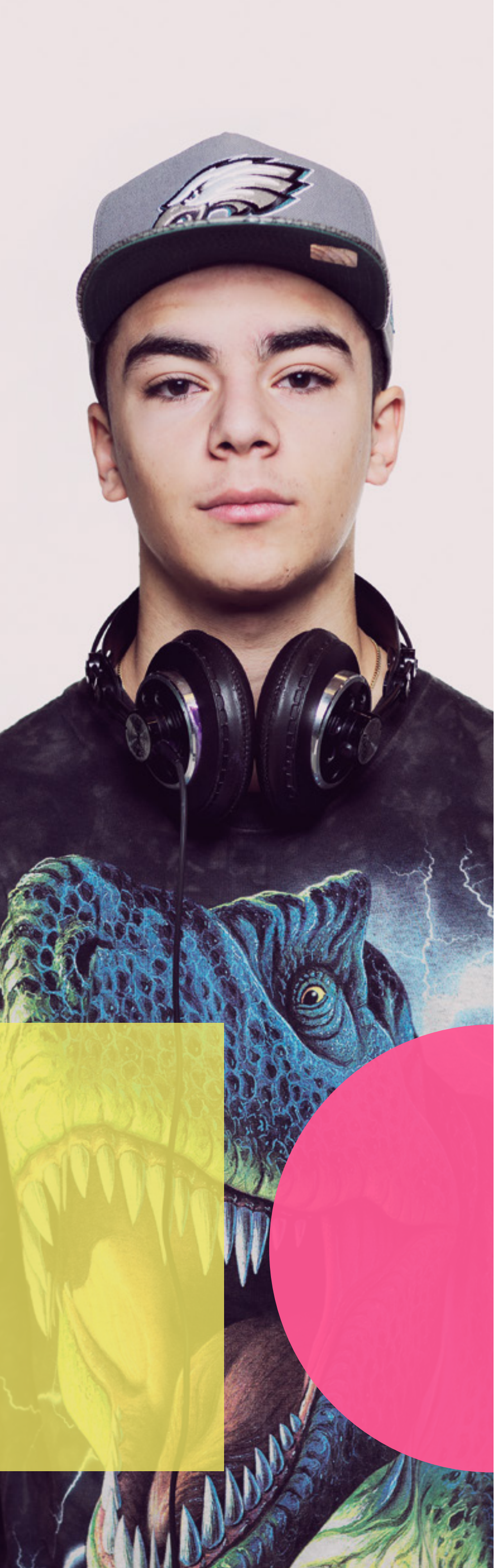

Media Development 2013

The DR Audience Research Department's annual report on the use of electronic media in Denmark

DR

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Streaming has become mainstream

2013 will be remembered as the year streaming became fixed in the minds of Danes – and their media consumption.

By Lars Thunø
Audience Research Manager, DR Audience Research

With Netflix at the forefront, Danish and foreign streaming services left their mark on the Danish media landscape in 2013. While Spotify had already taken a large share of Danish music consumption, the headlines in 2013 were all about streaming of TV. About 4 out of 10 Danes report that they stream TV, but the numbers also show that heavy consumers of streamed content are still few in number – streaming is a supplement. Still, traditional TV viewing declined 8% from 2012 to 2013 and the advance of streaming appears to be a significant factor in this development. But we must ask an essential question here: How do we actually define TV? Whether the content comes from a TV station or an online service means little to the people sitting in front of the screen. Some of the traditional TV viewing that was dropped was beyond doubt picked up by the new distribution forms and thus still functions as a new form of TV viewing in Danish homes.

There was some discussion in 2013 about what share of total TV viewing is made up of online viewing. This is not an easy question, since it is difficult to arrive at clear answers due to the limitations of existing measurement methods. Nevertheless, in this publication, DR Audience Research attempts to present the state of affairs in 2013, estimated on the basis of several different sources.

High usability has been an important factor in the increased distribution of streaming services. The services have quite simply been easy for all demographic groups to access.

Combined with the widespread use of smartphones and tablets, one significant reason behind the success of streaming services is that they have not been restricted to the relatively small group of individuals who are interested in technology. From the very beginning, it has been easy for everyone – men and women, children and older people – to make the transition to the new way of consuming media content. The tendency does not apply only to streaming. Taken as a whole, the new technologies have become part of everyday life. For example, about 2 out of 3 Danes own smartphones, and the women have caught up with the men here, while 3 out of 4 children aged 5-12 have access to a tablet.

I hope you enjoy Media Development 2013.

Lars Thunø
Audience Research Manager
DR Audience Research

HOW LONG DO DANES WATCH TV EVERY DAY, ON AVERAGE?

Target group: 3+

Source: TNS Gallup TV Meter

TV

Biggest drop in TV viewing ever

Danes still watch a lot of TV, but 2013 brought a significant decline in TV viewing. Meanwhile, the battle for viewers among the big four – TV 2, DR, MTG TV and SBS Discovery – has become fiercer. DR1 and TV 2's main channels have never been more evenly matched and MTG TV regained a nice lead over SBS Discovery in 2013.

By Henrik Gregor Knudsen
DR Audience Research

TV VIEWING DECLINES FOR THE THIRD CONSECUTIVE YEAR

Viewing of traditional broadcast TV declined for the third consecutive year. Danes spent precisely 3 hours a day in front of the TV, 15 minutes less than in 2012.

This is the steepest drop ever since measurement of viewership began. However, the 8% decline from 2012 to 2013 should be considered in light of the drastic increase in TV viewing during the period of 2007-2010. Danes thus still watch a great deal of TV and 2013 is still high on the list of peak years for TV viewing.

The decline in TV viewing occurred across genders, ages and lifestyles, but is most pronounced among men and younger viewers. Among viewers aged 21-40, for example, the decline was 12% from 2012 to 2013, but 7% for the 41-60 age group and only 2% among the oldest segment of the population.

One significant cause of the decline in TV consumption is that Danes have enthusiastically embraced the new streaming services. Just how much of the decline in TV viewing can be attributed to streaming services cannot be directly measured, but among Danes who report that they stream at least once a week, time spent viewing TV declined by about 25% in 2013 relative to 2012. Danish consumption of streaming services will be discussed in greater depth on page 30.

There are other reasons, however, that the decline in TV viewing accelerated from 1-2% in 2011-2012 to 8% in 2013. While summer 2013 offered masses of sunshine hours, summer 2012 was both rainy and filled with Olympic Games coverage. DR1 also broadcast the viewer magnets *Matador* and *Forbrydelsen*, which probably helped boost TV viewing in 2012.

TV 2: MAIN CHANNEL STILL BLEEDING

TV 2 and Danish TV viewers celebrated their silver anniversary in 2013. With an audience share of 23.3%, TV 2 is still the biggest TV channel in the country, but the result is the weakest in its history and the lead over DR1 has never been slimmer.

The decline from 2012 to 2013 amounted to 0.7 audience share points and was attributed to fiercer competition, waning viewer loyalty to legacy programming and difficulties launching new shows with wide audience appeal.

For example, both *Årgang 0* and *Liebhaverne* lost hundreds of thousands of viewers from 2012 to 2013, while new shows like *Drengerøv og datter*, *De hemmelige trin* and *Jagten på det grønne guld*, after being broadcast only a few times to modest ratings, have been moved out of prime time or banished to another channel.

However, it is not only the main channel that is losing viewers. TV 2 Charlie lost an audience share of 0.2 percentage points and thus slid from being the third-largest TV channel in the country in 2012 to being the fifth-largest in 2013. The decline is attributed mainly to problems in the fiction-heavy afternoon flow.

TV 2 Film also posted an audience share loss of 0.2 percentage points, but the main cause here is declining household distribution. TV 2 Zulu held on by the skin of its teeth thanks to new shows like *Tomgang* and *SJIT Happens* and lost only 0.1 percentage points in audience share.

While there were setbacks for most members of the TV 2 family, TV 2 News can celebrate 2013 as its best year ever with an audience share of 3.7%. The new Danish outdoor recreation channel, TV 2 Fri, is also showing good progress with an audience share of 1.1% since the premiere in May.

DR: RELAUNCHED TV PORTFOLIO

DR1 grew for the second consecutive year and posted an audience share of 20.3% for 2013. The improvement should again be attributed to the expansion of prime time in connection with the rescheduling of *TV Avisen* in autumn 2012. DR1 has also strengthened its offering to Danish viewers in the 18:00 slot with shows like *Antikduellen* and *Price inviterer*, which has had a positive impact on the entire early evening flow.

Following the relaunch of DR1 in autumn 2012, attention was turned to the rest of the TV portfolio in 2013. DR2 was relaunched as a public news and information channel which has among else resulted in a new current events-driven daytime flow. This manoeuvre improved audience share for DR2 from 4.2% in 2012 to 4.6% in 2013, which obscures its notable success in the daytime hours and the minor setback in prime time.

At the beginning of the year, DR HD was sacrificed in favour of DR3. With an audience share of 1.7%, DR3 is on par with DR HD, which benefited from several attractive simultaneous broadcasts with DR1. Among DR3's primary target group of viewers aged 15-39, however, the channel is doing very well.

In addition to its own portfolio of programmes on arts and culture, history and serious philosophical questions, DR K adopted several programmes from other DR channels in 2013. Audience share rose from 1.4% in 2012 to 1.8% in 2013, which makes DR K the Danish TV channel with the highest relative growth for the second consecutive year.

DR now also controls two children's channels: DR Ramasjang for children aged 3-6 and DR Ultra for ages 7-12. The change from one children's channel to two with different target groups has increased the share of children's TV viewing under the

AUDIENCE SHARES BY CHANNEL FAMILIES

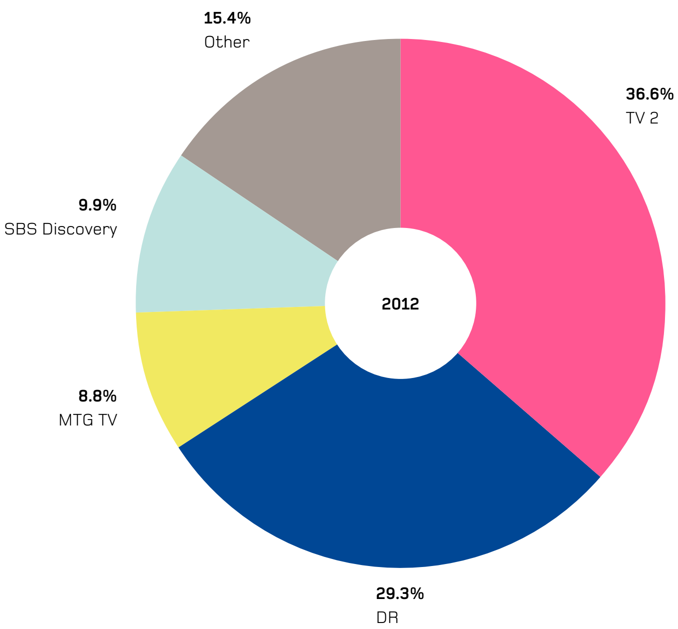
In 2012, TV3 Sport 1 was part of the TV 2 family under the name TV 2 Sport.

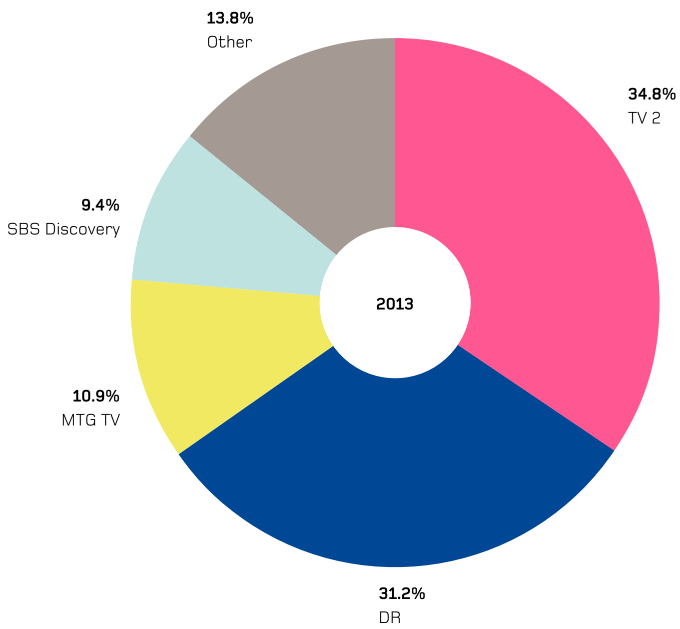
SBS Discovery was two independent companies in 2012.

MTG TV was formerly called TV3.

Target group: 3+

Source: TNS Gallup TV Meter





aegis of DR. The division has also made it easier to produce age-specific programming, such as news for children in the form of *Ultra Nyt*, which is viewed daily by 12,000 children aged 7-12.

MTG TV: ROBINSON REUNION

With an audience share of 4.8%, TV3 can in 2013 once again call itself the third-largest TV channel in Denmark. The advance of 0.4 percentage points in audience share compared with 2012 is mainly down to *Masterchef*, which is broadcast most weekdays in the 19:00-20:00 slot. *Robinson Ekspeditionen* returned after a one-year hiatus and with a season average of 271,000 viewers has made a tidy contribution to the audience share accounts.

TV3+ posted a decline in audience share of 0.4 percentage points and ended the year at 2.7%, its worst result since 1998. Football is the main viewer draw to TV3+, but many of the purchased series are having a hard time keeping up the pace of earlier years. This is probably due to the fact that many younger men – the channel's core target group – are heavy consumers of streamed fictional content.

MTG TV, a new name in the TV3 channel family, brought TV 2 Sport under its wing at the beginning of the year. It was then renamed TV3 Sport 1 and was joined by the significantly smaller TV3 Sport 2. TV3 Sport 1 has added 0.1 audience share points to the 2012 outcome, bringing it to 1.7%. TV3 Puls delivered an audience share of 1.4% for 2013, unchanged relative to 2012.

SBS DISCOVERY: NEW TV ALLIANCE

Kanal 4 ended the year with an audience share of 1.8% and Kanal 5 ended up at 3.7%, both results essentially unchanged since 2013. In the company of 191,000 viewers, Kanal 4 celebrated the 400th episode of *De unge mødre* in spring. There was not as much to celebrate at Kanal 5, when the second season of *Big Brother 2.0* lost about one third of its audience compared with the first season and ended up with a season average of 89,000 viewers.

While the situation has not changed for Kanal 4 and Kanal 5, the two channels 6'eren and 7'eren posted minor losses. 6'eren benefits from football on Tuesdays, but sags on the weekends. 7'eren was formerly a window on Voice TV but has been an actual TV channel since the beginning of the year with a modest audience share of 0.2%, which is actually a decline by 0.1 percentage points compared with Voice TV

2013 was also the year SBS and Discovery officially merged. Measured in terms of audience share, the old SBS channels are by far the biggest, while both Discovery Channel and TLC have audience shares of 0.9% and 0.8% respectively, followed by Animal Planet at 0.2%. Overall, SBS Discovery thus lays claim to 9.4% of the time Danes spend in front of the TV.

2014 ONE STEP FORWARD AND TWO STEPS BACK

The size ratio between DR1 and TV 2 will be an interesting story in 2014. Although DR1 has the wind in its sails, TV 2 has begun making significant progress again. TV 2 successfully increased audience share in the second half of 2013 compared with the same period in 2012, while DR1 lost audience share – although primarily due to the absence of *Matador* and *Forbrydelsen*.

And it looks like there is going to be an exciting duel in 2014 between the two other major channel families. While SBS Discovery was nipping at the heels of MTG TV in 2012, the former suffered a setback in 2013. If we look at the commercial audience share among viewers aged 15-50, the gap between MTG TV and SBS Discovery increased to 2.9 audience share points in 2013 in MTG TV's favour.

Underlying factors in this development include a battle for attractive sports rights – including MTG TV's buyout of TV 2 Sport. A response to this move may occur, however, since SBS Discovery has an option to increase its stake in Eurosport from 20% to 51%. SBS Discovery also has an opportunity to recoup part of the loss if it manages to get the new and considerably bigger channel portfolio to work together.

The past year on Danish TV

1 January

1.8 million more or less hung-over Danes watch as the premiere of the final season of *Borgen* rolls across the screen on DR1.

27 January

About 2.3 million Danes tune into DR1 and TV 2 to watch the men's handball team take a beating from Spain in the final match of the World Championships.

28 January

87,000 are watching as *Monte Carlo elsker Putin* rolls across the screen, the first-ever programme on DR3.

2 March

The final episode of *Matador* is broadcast for the seventh time on DR1 to the delight of 1.5 million Danes.

4 March

DR Ultra goes on air and DR Ramasjang and DR2 are relaunched the same day.

2 April

Thomas Blachman causes a lot of talk when he and author Jan Sonnergaard – along with 135,000 Danes – look at naked women on DR2.

16 April

De unge mødre (Young Mothers) hits the 400-episode mark on Kanal 4 in the company of 191,000 viewers.

26 April

The teachers' lockout ends after four weeks, during which TV viewing among school-age children during the daytime flow doubled compared with normal.

5 May

TV 2 Fri goes on air and 248,000 Danes tune in over the course of premiere day.

16 May

Nicolas Butler wins *Paradise Hotel* on TV3 before an audience of 313,000 primarily younger viewers.

18 May

1.7 million Danes watch as Emmelie de Forest wins The Eurovision Song Contest.

21 July

Chris Froome wins the Tour de France. The live coverage on TV 2 attracts an average audience share of 47%.

19 August

385,000 viewers walk the plank with Amin Jensen in the premiere of the TV3 programme *Stjerner på vippen (Stars in Danger: The High Dive)*.

11 September

194,000 Danes attend a wedding on DR3 as three couples say 'I will' to each other in the second episode of *Gift ved første blik (Married at First Sight)*.

23 September

After a one-year hiatus *Robinson Ekspeditionen (Survivor)* returns to TV3, making 309,000 viewers happy on opening night.

1 October

TV 2 and Danish TV viewers celebrate 25 years together.

28 October

TV 2 News sets a new viewership record as winter storm Allan pummels Denmark.

22 November

Allan Simonsen is smoking hot on *Vild med dans (Strictly Come Dancing)* before the very eyes of 1.3 million TV viewers.

5 December

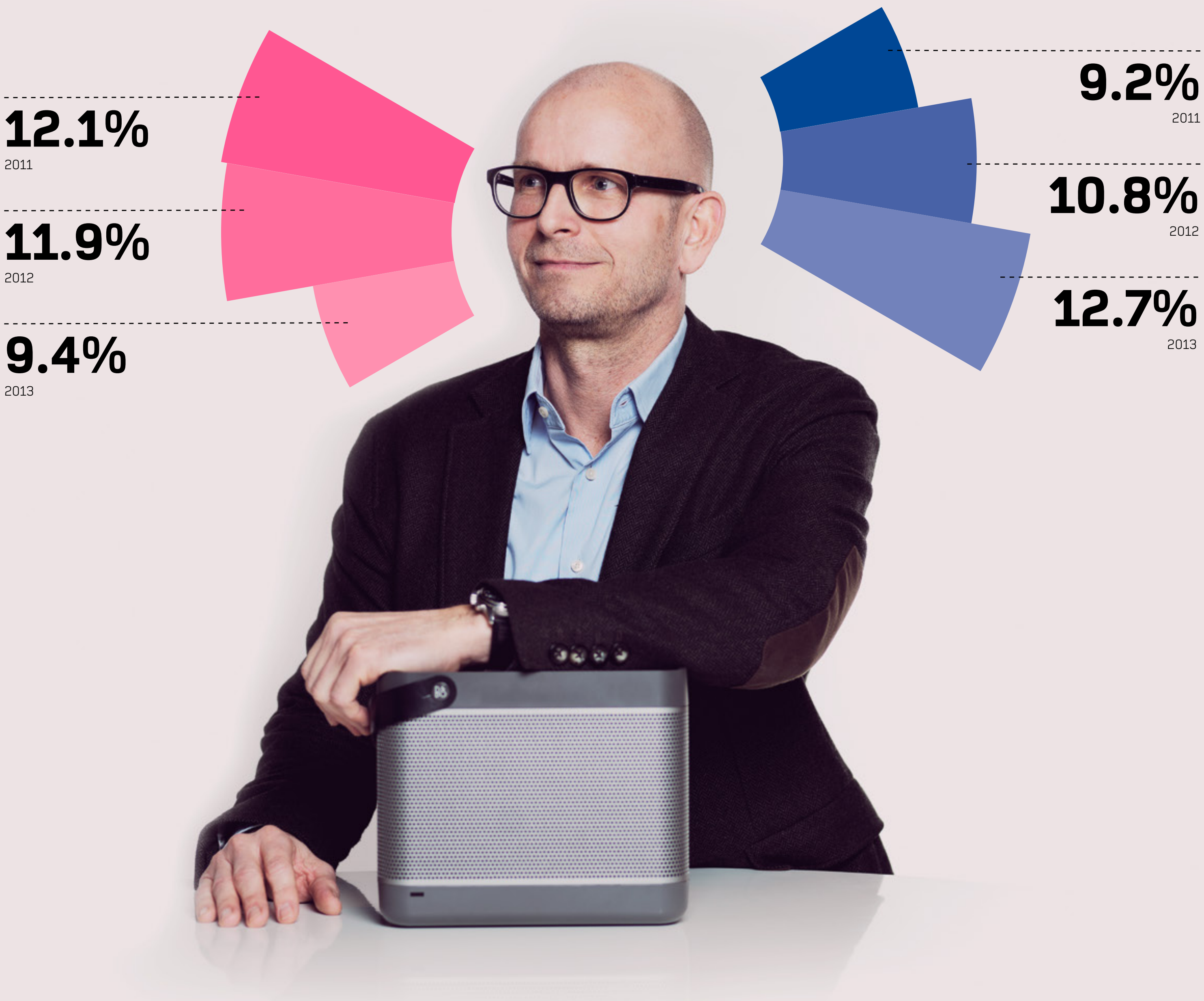
Measured in viewership, DR2 has its best day ever when winter storm Bodil hits Denmark.

COMMERCIAL RADIO AUDIENCE SHARES

Target group: 12+

Source: TNS Gallup Radio Meter

- National commercial radio
- Local commercial radio



Radio

Commercial radio: Local outstrips national

2013 was a landmark year for commercial radio. Local commercial radio outstripped national commercial radio in audience shares and became the largest commercial sector for the first time in the history of electronic measurement of radio audiences.

By Dennis Christensen
DR Audience Research

A BANNER YEAR FOR LOCAL COMMERCIAL RADIO

For the first time since electronic measurement of radio audiences began, local commercial radio stations have reaped higher audience shares than the national commercial channels. The difference between the two commercial sectors had already narrowed by 2012 and the national commercial stations were left behind in 2013. The audience share for local commercial channels is now 3.3 audience share points higher than for national commercial channels.

Overall, this means that commercial radio had a minor setback from 22.7% of radio listening in 2012 to 22.1% in 2013. The audience share lost by the commercial channels was distributed between DR and Radio 24syv.

The familiar story of a medium that Danes are using less is behind the changes in the radio market's audience share. Listening time also declined from 1 hour 59 minutes per Dane and per day to 1 hour 57 minutes in 2013. The proportion of Danes who use the medium over the course of a week also dropped by one half percentage point in 2013.

But those who have not abandoned the medium and are still listening are also actually listening for fewer minutes. An average radio listener who turned on the radio in 2013 listened for 2 hours 38 minutes – slightly less than the year before. The combination of fewer listeners and less listening time among those who still listen is evidence that the radio medium is in decline.

NEW SBS DISCOVERY STRATEGY IS STILL NOT A SUCCESS

SBS was bought out by Discovery at the end of 2012. SBS had acquired Radio 100, Radio Soft and Radio Klassisk six months earlier, so all national commercial radio is now gathered under the umbrella of the new merged media company. In March 2013, SBS Discovery announced that it would launch an ambitious new radio strategy as of 2 April 2013. The main points were:
1. Stronger focus on the 15-50 target group. 2. Establishment of MyRock as a male-oriented rock music channel available in larger cities. 3. Radio 100 adjusted the profile with greater emphasis on rock music and its coverage improved. 4. Revamping of Pop FM and 5. Shift of Radio Soft and Radio Klassisk to digital-only distribution via SBS Discovery's online radio station, Radio Play.

Unfortunately for SBS Discovery, the new strategy has so far not proven successful. While SBS Discovery's national channels had an audience share of 11.9% in 2012, the share declined early in the year, from January to March, to a level of 9.7% – and after the new strategy was implemented, the share slipped further to 9.3%. Looking at the commercial target group, aged 15-50, audience share has also dropped from 17.5% to 14.4%.

Nova FM was meant to have a central role in the new strategy and is also the SBS Discovery channel that has delivered the best performance. Among listeners aged 15-50, the channel improved slightly to 6.9% as of April and afterwards. MyRock has not been a major player on the market and can only manage a share of 0.5% among the target group. Radio Soft, The Voice and Pop FM all lost audience shares in 2013, but the biggest loser was the old main brand Radio 100. Despite better coverage and a new profile, the channel's audience share declined steeply from 4.2% of listening time among 15-50 year-olds in 2012 to 1.6% of listening time after the restructuring.

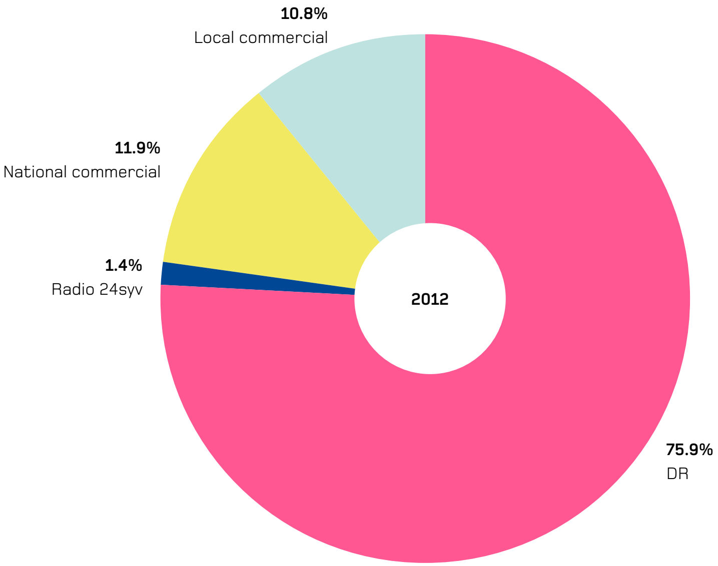
P7 MIX DELIVERS DIGITAL SUCCESS

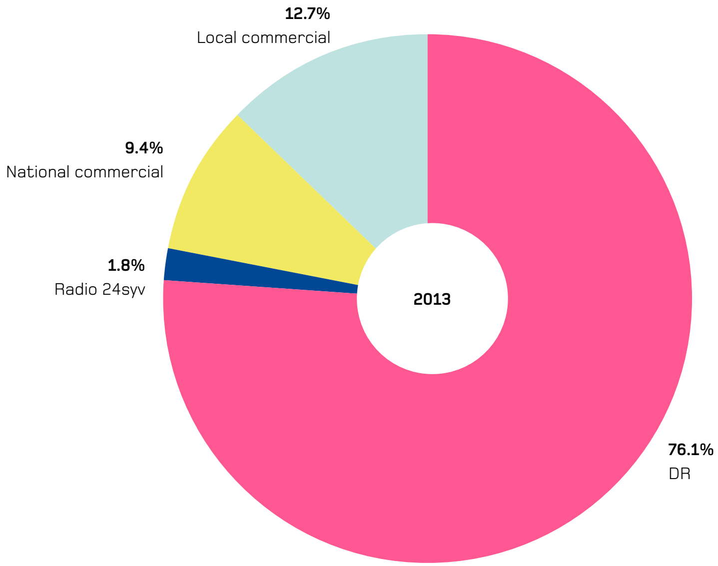
The bright spot of the year for Danish radio has to be P7 Mix. The channel is purely digital and with its pop music programming has steadily gained listeners who, among else, tune in for the 7-hour-long marathon broadcasts on Sundays. An average of 420,000 Danes listened to the channel in 2012, a figure that grew to an average of 570,000 listeners per week in 2013.

AUDIENCE SHARE DISTRIBUTED ACROSS SECTORS

Target group: 12+

Source: TNS Gallup Radio Meter





The channel has achieved healthy growth in audience share, which nearly doubled from 1.5% in 2012 to 2.7% in 2013.

P7 Mix is the most popular digital-only channel in the country and its success has also entailed a general advance for digital listening in Denmark. Total digital listening is rising generally and Danes also increased their digital radio listening in 2013. Digital listening to DR increased in 2013 by slightly more than 2 minutes to 15 minutes per Dane and per day. P7 Mix accounted for 20% of digital listening – a significant advance compared with 2012, when the channel accounted for 13%.

This growth is also evident in the share of radio listening via sources other than traditional FM radio. While 90% of radio listening occurred on FM in 2010, that figure is now 76%. Digital listening rose from 14% in 2012 to 17% in 2013.

Even though the digital share of listening has risen, there is still not much to indicate that the total digital share of listening will ever come close to the 50% share set as the trigger for initiating discussions of shutting down FM in Denmark. The unknown quantity here is P4, which already accounts for a tidy 10% of digital listening, but has greater potential. The channel is not broadcast on DAB, but can only be heard digitally via the internet.

A MEDIUM WITH A DIGITAL FUTURE?

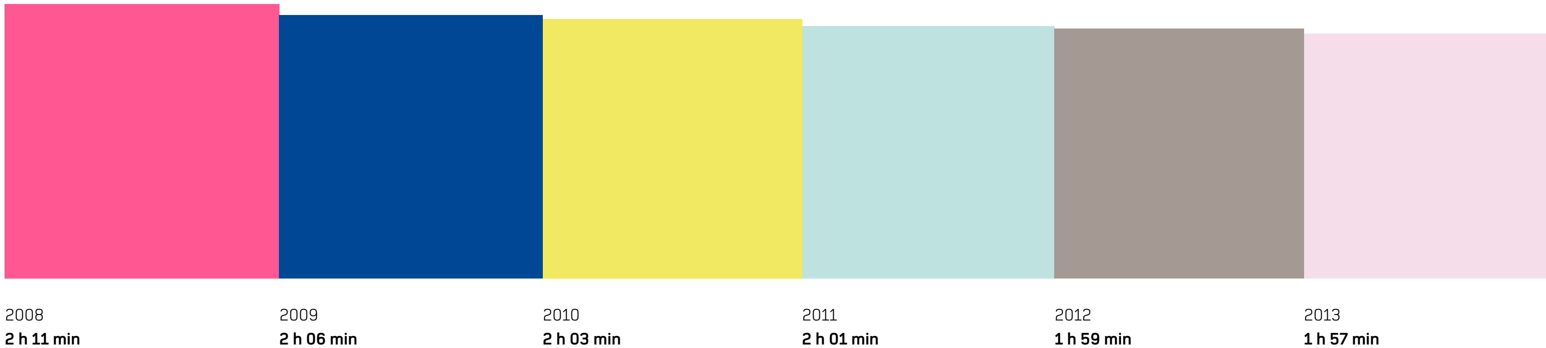
Political decisions were made in 2013 that may potentially impact the radio medium and its possible digitalisation. The Danish Agency for Culture presented an adjusted timetable for digital radio in Denmark, which included a change of the DAB standard in Denmark, with the transition to the DAB+ standard slated for 1 December 2014. Among other consequences, DR's P4 may be broadcast on DAB. This may, of course, have a powerful impact on Danes' digital radio listening, since P4 alone accounts for 41% of radio listening among Danes. It will be very interesting to follow the effects of this on digital listening. On the other hand, it is uncertain what a format change would mean for the radios owned by Danes. We know that 37% of Danish households have access to DAB radios, but what percentage of these radios is compatible with the DAB+ standard is unknown.

It is thus still unknown whether it will be possible to reach the 50% listening share that must be digital in 2018 before deliberations on the future of the FM band can commence. The future of digital radio thus remains uncertain in Denmark, even though we did become a bit clearer in 2013 as to what the conditions for radio will be over many years to come. At the end of the day, it is still up to Danes whether they embrace digital radio. A channel like P7 Mix will probably play a central role here, since content and channel selection are still the top reasons Danes state for buying digital radios.

HOW LONG DO DANES LISTEN TO THE RADIO EVERY DAY, ON AVERAGE?

Target group: 12+

Source: TNS Gallup Radio Meter

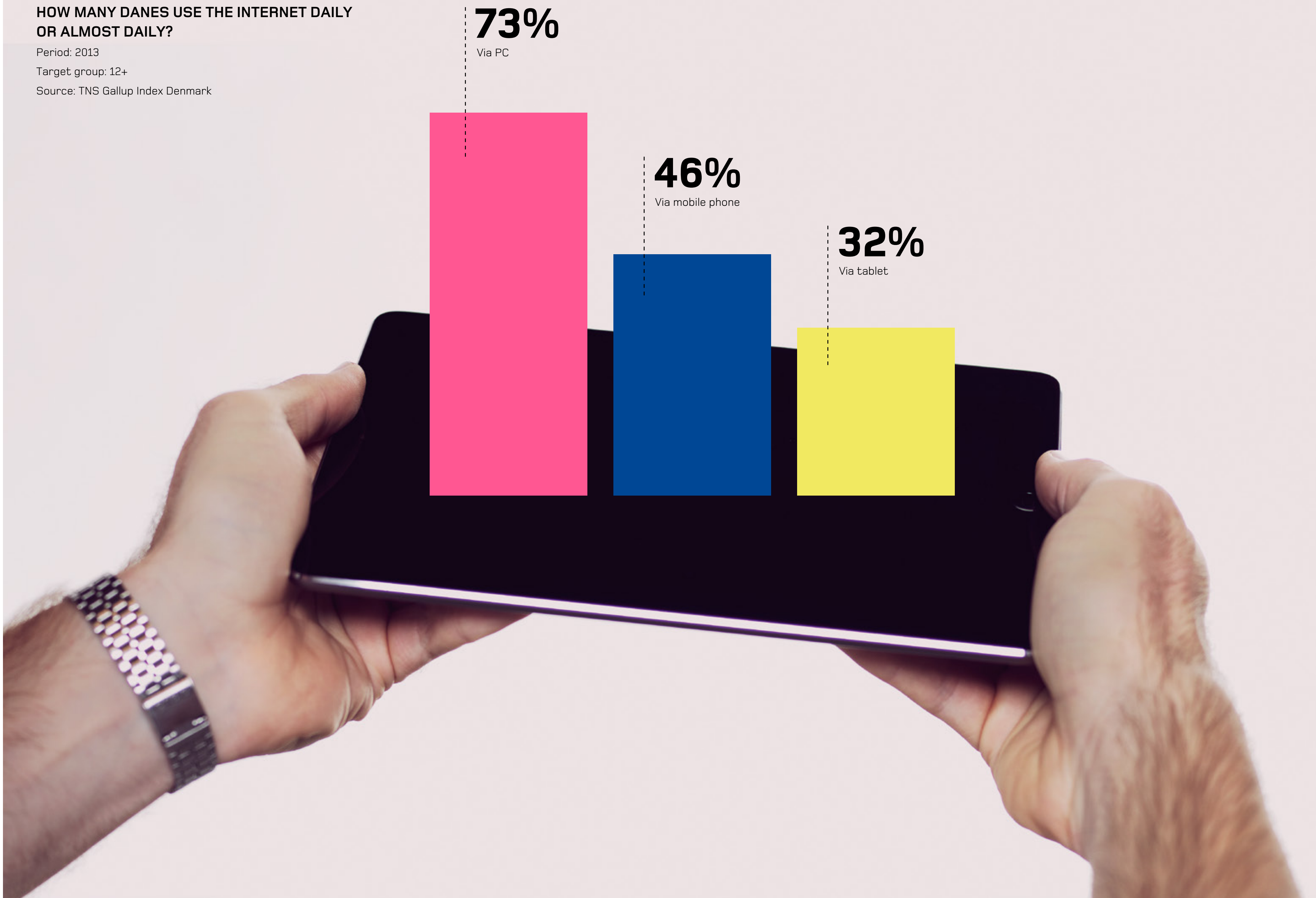


HOW MANY DANES USE THE INTERNET DAILY OR ALMOST DAILY?

Period: 2013

Target group: 12+

Source: TNS Gallup Index Denmark



net

The internet is getting bigger on small screens

Smartphones and tablets have become more central to our internet usage and this has consequences for traditional use via conventional PCs. And while Danes are becoming more mobile, the major American content providers are ensconced firmly on the internet throne in Denmark.

By Uffe Høy Svenningsen
DR Audience Research

Danes are online like never before. In 2013, 78% used the internet daily, an increase from 75% in 2012. The use of smartphones and tablets has accelerated in recent years and Danes have gained access to online content in essentially all situations around the clock. While the internet is traditionally an independent media platform, it has also increasingly become a distribution channel for media content on other platforms, such as streaming apps from providers like Viaplay, Netflix and Spotify or through game consoles and boxes like Apple TV that bring content to the large-screen TV.

Many people have invested in tablets. One out of three Danes uses a tablet to connect to the internet every day, and almost half of tablet owners report using their tablet for purposes for which they formerly used a PC. About one out of five say that the tablet has replaced most of their PC usage and thus it is no surprise that internet use via conventional PCs is declining among Danes under the age of 40. There is one characteristic in particular that Danes value highly: Tablets are always connected and do not have to boot up first like conventional PCs. Tablets have also made the net more accessible to many users. For example, we see the largest growth in tablet usage among the older segment of the population, people aged 60-70, 33% of whom had access to a tablet in 2013 – more than twice as many as in 2012. Tablets have also become a significant gateway to online content for many children. A full 74% of children aged 5-12 have access to a tablet, a strong increase from 2012 when the level was 51%. The number of tablets owned by families with children is markedly higher than the number owned by households with no children, and 41% of Danish children aged 5-12 use apps on a tablet essentially every day.

MOBILE INTERNET USE IS BECOMING MORE IMPORTANT

Distribution of smartphones also became more widespread in 2013 and 46% of Danes now use the internet from their mobile phones daily. In this context, we can talk about an explosive development and a doubling of the level from 2011, regarded by many as the breakthrough year for mobile internet use. The wide distribution is also evident in Danish consumption of news via the internet. Looking at the largest Danish newspaper on the net, about one-fourth of total traffic now occurs via the mobile edition. Here as well, we have seen a significant increase in recent years and there is strong potential for advertising revenues. When Facebook released its financial report for the third quarter of 2013, the report stated that almost half of global ad revenues come from mobile advertising. Facebook has a tremendous advantage in that users log in and the company thus knows its users at a detailed level.

The new mobile devices with smaller screens have also made the job harder for publishers of internet content. Should they make dedicated sites for smartphones and tablets, or should they make apps – and how often should they update them? Another consequence of rising mobile internet usage is that it has become very difficult to satisfactorily measure internet use, since a significant share of usage occurs cross-platform. This also applies to Danish internet use measurement, which still cannot determine user figures for the mobile platform or total cross-platform user figures. Work to resolve this issue will be ongoing in 2014. This is particularly relevant to ad-carrying net media in relation to the documentation they need when they are selling advertising space.

THE AMERICANS ARE RUNNING AWAY WITH THE DANES' ATTENTION

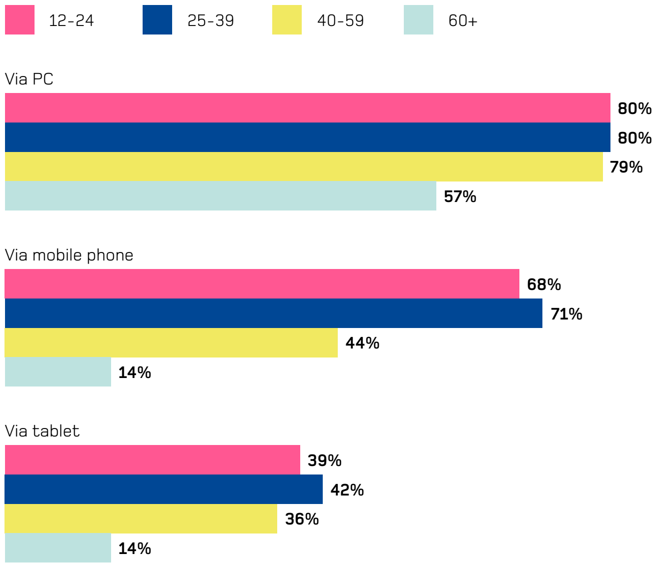
Two American companies, Google and Facebook, dominated the Danish internet market in 2013. This is nothing new and there is much to indicate that the dominance is going to become more pronounced with every year that passes. According to the Danish internet market

HOW MANY DANES USE THE INTERNET DAILY OR ALMOST DAILY?

Period: 2013

Target group: 12-24, 25-39, 40-59, 60+

Source: TNS Gallup Index Denmark



measurement, only Google, Facebook and YouTube (owned by Google) reach more than two million Danes over the course of an ordinary month. Danish providers like dr.dk, tv2.dk, eb.dk and dmi.dk are also used by more than a million Danish users, but they have a long way to go to catch up to the big American websites in terms of user numbers, time spent and page-views. This is significant because it has strong impact on how Danes find content on the net.

Denmark is still a Facebook nation. Facebook is used by far more than half of all Danes and has wide reach across all age groups. Although there is constant chatter about the sustainability of Facebook, there are thus far no signs it will pass its best-by date anytime soon. Meanwhile, the growth of the newer services Instagram and Twitter indicates that social activity on the net is going from strength to strength. While 9% of Danes, according to Gallup, had a Twitter profile in 2012, the level rose to 14% in 2013. In 2013, two out of three Danes used social media and the majority do so every single day.

ENTERTAINMENT AND STREAMING

With a massive selection of content, it is easy to kill time on the internet. Daily net-surfing is a pastime for almost 40% of Danes and the phenomenon is growing – in 2010, the level was 26%. More Danes are thus finding their entertainment via the internet – with a lot of help along the way from social media, streaming provided by services like YouTube and rapidly shared news and articles from most of the world. Netflix and HBO Nordic were launched in Denmark in late 2012 and streaming has been a hot topic ever since.

According to Index Denmark, 18% of Danes report using the internet to view TV produced by the TV channels at least weekly, while the level in 2012 was 15%. Thus, while we are seeing growth, heavy consumers of streamed content remain relatively few in number. The large age differences are part of the picture. Among Danes under 40, the level is 29% compared with 23% the year before.

On the one hand, the net platform is hyper-fragmented with a vast selection of content. On the other hand, it is dominated by a few transnational services that enjoy near-monopoly status in their segments among Danish internet users. Facebook, Google, YouTube and Wikipedia are the primary examples. The tendency is also seen among the new streaming services. The majority of use is concentrated to two providers, Netflix (film and TV series) and Spotify (music), even though there are many other competing subscription services.

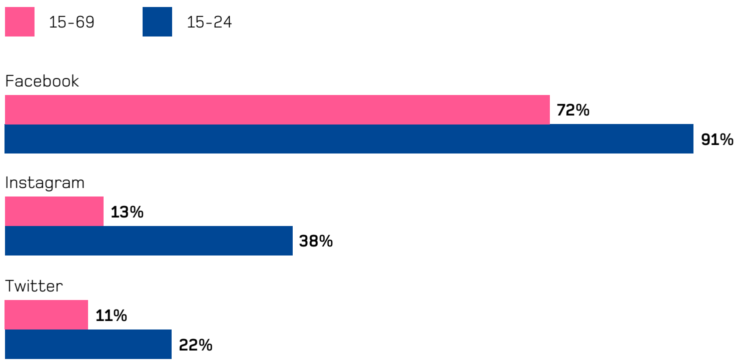
This does not eliminate potential scope for other players, but it does not change the fact that Danes concentrate a fairly large share of their time spent on streaming to relatively few services.

WHICH SOCIAL MEDIA DO DANES USE?

Period: 2013

Target group: Age 15-69 and age 15-24

Source: Norstat for DR Audience Research



Three things viewers want

TV viewers had three important demands on TV programming in 2013. First of all, the programme presenter must show enthusiasm and involvement. Next, viewers did not want programmes that were too contrived. And finally, viewers do not want to be strung along. They want conclusions served on a silver platter, right here and right now.

By Lene Heiselberg and Mette Birk
DR Audience Research

THE PRESENTER SHOULD SHOW ENTHUSIASM AND INVOLVEMENT.

Based on several viewer evaluations, DR Audience Research has found that a TV presenter's personal stake in the programme is all-important. In relation to reporting the weather, for example, viewers prefer the personal story told by a charismatic TV presenter who is a born storyteller over one who is primarily a professional, matter-of-fact and objective reporter. And when it comes to sports presenters, we see a higher degree of trust in presenters who are former sports stars themselves, since viewers can then easily see the presenter's personal enthusiasm for the subject.Viewers want 'the whole person' as a TV presenter – a person who shows more than his or her professional side. Viewers are annoyed when the presenter's monologue is perceived as rehearsed lines, but consider honesty and spontaneity as positive traits. As an example, one young female viewer describes her appreciation for a sports presenter's personal enthusiasm:

'I think it is so cool that she really gets involved in the match and says: "That was so exciting, I'll just have to see if I can say anything at all!" I love her engagement and humour, and that she lets her emotions run wild!'

Woman, age 16

Viewers simply prefer presenters who show their human side and have a personal stake in the programme: they cannot be too polished or maintain a professional distance.

If we look at the Danish programmes that have hit the broadcast flow this year, there are an incredible number of programmes with presenters of the type who take viewers by the hand and show them reality from a subjective perspective. The tendency runs from the nosy Felix Schmidt in *Felix jagter vejen til succes* (TV 2) to the goal-oriented Asger Aamund in *Asger og de langtidsledige* (DR2) and on to the worried Bo Bech in *Køkkenkrisen* (TV3).

VIEWERS REJECT THE CONTRIVED AND ARTIFICIAL

Viewers are annoyed when they encounter programming whose narrative design is too contrived. For example, we saw in 2013 that viewers were critical of teasers about what will be coming up soon on news programmes, magazines and lifestyle programmes because they perceive them as annoying, contrived tricks that waste their precious time. Explicit cross-cutting was also frowned upon because the obvious stylistic trick was decoded as media hype. There should be a reason for an action, and viewers become critical if the action does not seem authentic. Here is a typical viewer reaction:

'I don't like the repetitions. It's as if you have to be constantly reminded what programme you are watching – surely that shouldn't be necessary. And why do they have to repeat the same thing on every programme, write on the refrigerator, on the car...? It's just too formulaic.'

Man, age 54

The actual programme design thus must not be too contrived and artificial. To a very great extent, viewers in 2013 were seeking authenticity. This was also reflected in the ratings of some of the programmes that do not resort to stylistic tricks. For example, *Bonderøven* and *Søren Ryge* (DR1) have seldom been as popular as they were in 2013. A very clear-cut format is a characteristic of TV3, but *Familien fra Bryggen* (TV3) is an example of the opposite, where the authentic style is sought after and few stylistic tricks are employed. The programme drew a lot of viewers to the channel in 2013. *Frihuset*, TV 2 Fri's flagship programme, is live and fills a large part of the channel's flow. It is still a striking example of a programme that is void of cross-cuts and formulaic repetitions.

SERVE THE CONCLUSION ON A SILVER PLATTER

In our viewer evaluations at DR Media Research, we discerned a preference for 'the whole truth, now.' In evaluations of magazine and lifestyle formats, it was very clear that viewers do not want to wait for a conclusion or pay-off. A few programmes work on the principle of having a season finale before the summer and Christmas holidays in which they take a closer look at how things have gone with selected things or people. But as the viewers put it:

'I can't wait for the season finale, I want the results now in this programme...Don't put me on hold with a catchy tune like the phone companies do.'

Woman, age 42

DR Audience Research observed the same point in a viewer evaluation of the first test pilot of the food magazine *Bitz & Frisk*, which is broadcast after *TV Avisen* on DR1.

TV viewers were very concerned that the results the programme found would be made clear during the programme. Viewers thus want a better wrap-up and a clearer conclusion. When they watch TV mainly for relaxation and entertainment, viewers do not expect to have to do the thinking themselves. That part is up to the TV producers.

In 2013, we saw the launch of several new consumer programmes, especially programmes in which experiments are set up in order to come closer to the truth about how the world actually works. Examples of programmes based on experimentation include *Gift ved første blik* (DR3) and *DR2 uden*… But programmes like *Detektor* (DR2) and *Den rene vare* (TV 2) are also examples of programmes that attempt to filter and test the copious information we encounter in our everyday lives so that we can get a clear answer served on a silver platter.

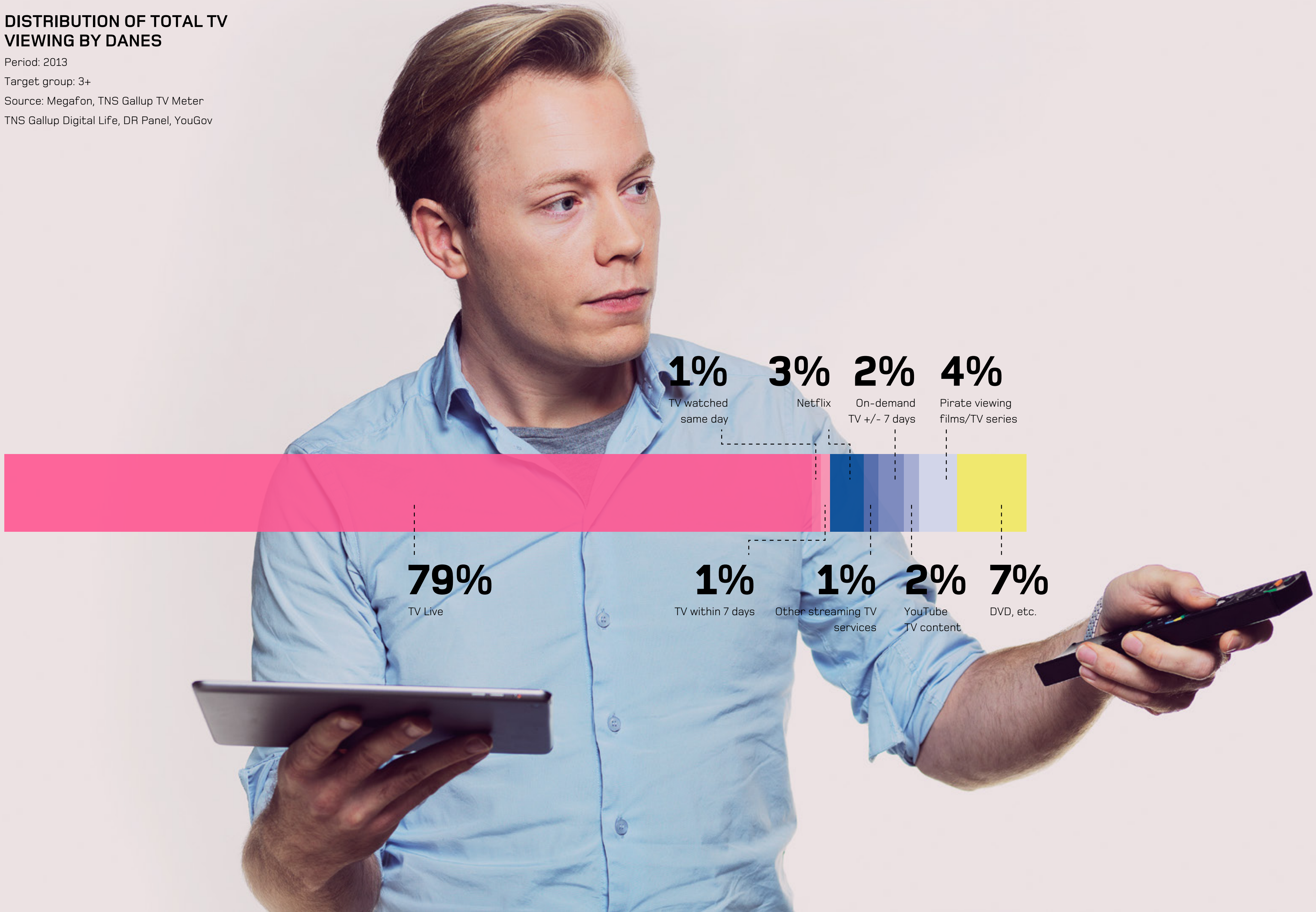
DISTRIBUTION OF TOTAL TV VIEWING BY DANES

Period: 2013

Target group: 3+

Source: Megafon, TNS Gallup TV Meter

TNS Gallup Digital Life, DR Panel, YouGov



Netflix is the sixth-largest TV channel in Denmark

After barely a year on the market, Netflix can now call itself the sixth-largest TV channel in Denmark measured in viewing time. DR Audience Research has taken on the difficult exercise of setting credible percentages to the sources of TV viewing and has concluded, among else, that internet viewing comprises 12% of total TV viewing – and almost twice as much among young people.

By Dennis Christensen and Niels Marslev
DR Audience Research

Barely one year old, Netflix is the sixth-largest TV channel in Denmark. Netflix laid claim in 2013 to about 3% of total viewing across all the various ways in which Danes watch TV – a little less than TV3, DR2 and TV 2 Charlie, but a little more than TV 2 News and Kanal 5. Whether 3% should be considered a little or a lot naturally depends on the impact of all the talk about streaming in the last six months.

Whether Netflix and the other streaming services should be called TV channels or TV providers is an open question. The services and their business models are rather different to what we normally consider TV. But the premise of this article is that the kinship is strong enough and the user benefit similar enough that we can talk about related forms of TV viewing, just as one can talk about most DVD viewing, relevant segments of YouTube and pirate viewing.

When we try to set percentages on the various providers' and distribution forms' slices of the TV pie, a long list of reservations and difficult calculations make themselves felt – see page 60 for more information. Nonetheless, the exercise contributes some much needed proportion to the debate which, in the absence of the desired facts, has been characterised by guesswork and gut feelings. The common denominator of the results discussed in this article is that, in an area characterised by tremendous uncertainty, they are DR Audience Research's best estimate of the state of affairs in 2013.

TRADITIONAL VIEWING DOMINATES, BUT ONLINE VIEWING IS ADVANCING

Traditional viewing on ordinary TV sets still dominates. Live broadcasts account for about 79% of Danes' total TV viewing. A couple of percentage points can also be ascribed to time-shifted viewing of broadcast TV. But while DVD and comparable viewing were formerly the most significant other sources of viewing, films and TV series on DVD and comparable media now account for about 7% of viewing. This form of viewing has clearly been outpaced by various forms of online TV viewing, which combined account for about 12%.

When it comes to online TV viewing, the distinction between 'streaming' and 'on-demand' should be discussed.

In this estimation, on-demand is defined as viewing of programmes or programme clips via the internet live or within 7 days before/after the live broadcast on broadcast TV. Streaming is defined as content viewed via the most widespread commercial services in Denmark, such as Netflix and Viaplay. Pirate viewing is all illegal streaming or downloading of films and TV series via the internet, but obviously this can be difficult to accurately measure or calculate. YouTube is a special hybrid product, which is included in the estimate here with the portion of content that can be considered comparable to traditional broadcast content. Overall, the guiding principle for the estimate is that it only covers content that could have been broadcast as conventional broadcast TV and viewed on conventional consumer electronic devices. This may sound all-embracing, but it does exclude things like film viewed in the cinema and unique video content on the net, including YouTube's user-generated content, minor video services like Vimeo, dedicated web TV stations like jyskebank.tv and distinct web TV sites like eb.dk.

No isolated data sources contain the necessary information and there is no established method for arriving at a definitive, compiled answer.

For this reason, the estimations are based on five different sources from 2013 and several methodological considerations. For the benefit of particularly interested readers, these considerations, conditions and reservations – 'the fine print' – are, as mentioned, discussed in greater depth on page 60.

ALMOST ONE QUARTER OF TV VIEWING BY YOUNG PEOPLE OCCURS VIA THE INTERNET

Young people have always watched less TV than older people. In return, the young have been early adopters and frequent users of new TV options and internet TV in the broad sense now occupies about 22% of total viewing by 15 to 30-year-olds. Netflix alone now accounts for about 6% of this age group's viewing and YouTube's 'TV-like' content for about 3%. While people aged 15-30 watch 20% less traditional TV than the general population, the difference narrows to about 6% when all sources are included. The frequent internet viewing by the young thus reduces the difference in TV viewing between young people and the total population.

Among 15 to 30-year-olds, Netflix takes a shared third place alongside DR1, but is behind TV3 in second place and TV 2 in first place. YouTube lags somewhat behind as the eighth-largest TV offering among young people.

ONE OUT OF FIVE HOUSEHOLDS HAS NETFLIX

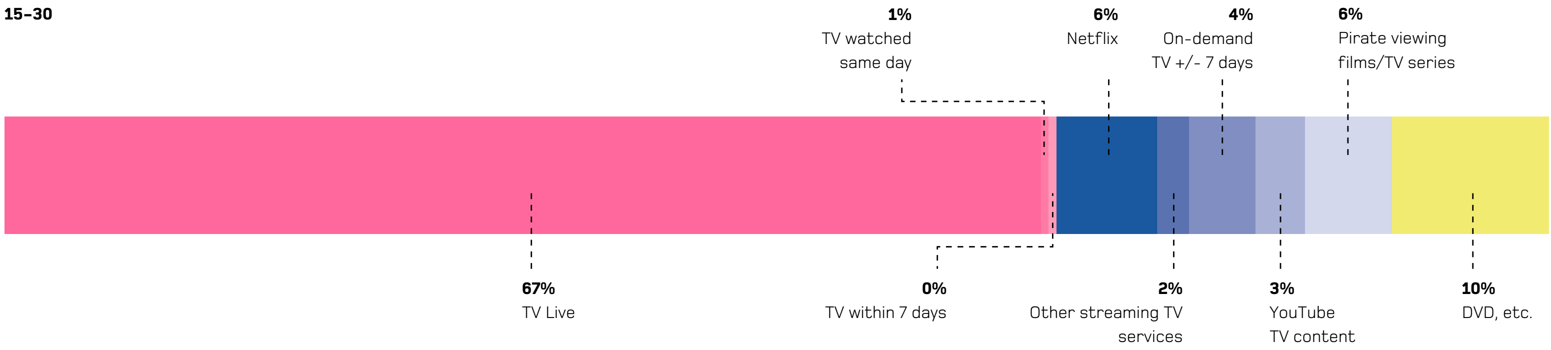
A study by DR Audience Research performed in connection with the first anniversary of Netflix Denmark in October showed that 19% of Danish households, equal to about 450,000 households, use Netflix. The great majority – 17% – are paying customers. An additional 9% have tried the service but no longer use it. This may sound like very high churn, but in relative terms it is lower than for competing services. Overall, 24% of households pay for one or more

DISTRIBUTION OF TOTAL TV VIEWING BY DANES

Period: 2013

Target group: 3+

Source: Megafon, TNS Gallup TV Meter, TNS Gallup Digital Life, DR Panel, YouGov



streaming TV services. With about 57% of all paying subscribers in the Netflix camp, the one-year-old American's market dominance is indisputable.

Netflix's distribution is remarkable in light of the fact that individual households must decide whether they want to pay for the service. Most traditional TV channels benefit from inclusion in the major distributors' TV packages and can thus also be viewed by a far greater number of households. In light of this relatively limited distribution, it is amazing that Netflix has managed to achieve sixth place measured in viewing time. This is largely due to the fact that Netflix is able to coax many viewer minutes out of their users. The average for the days on which viewers use Netflix is an impressive 80 minutes – outperformed only by the Danish channels TV 2, DR1 and TV 2 Charlie, which coax 98, 91 and 81 daily minutes, respectively, from their viewers, once they have captured their attention.

On the other hand, we can determine that after a rapid market entry, the Netflix growth rate is now more moderate. The 17% of households that pay for Netflix has grown from 14% in April, when both DR Audience Research and YouGov performed streaming studies.

MORE THAN HALF STREAM MUSIC OR VIDEO

Although TV and radio still fill most of the media picture, it would be an error to continue regarding the newer consumption forms as niche phenomena reserved for younger men. The fact is that 43% of households use one or more music streaming services, 40% watch TV over the internet (including services like dr.dk) and a full 57% of Danish households overall use either music and/or TV streaming. When over half of all Danish households are on board, streaming is no longer niche behaviour – it is mainstream. Among Danes aged 18-49, an impressive 4 out of 5 report that their households are enjoying the new digital delights. It should be noted, however, that even though many people have access to streaming services, they remain supplementary for most. Fewer are frequent users of the services. About one out of five Danes use TV streaming weekly and about 7% stream TV daily.

The commercial consequences for all segments of the TV industry are beginning to emerge. 12% of those who use streaming TV services claim to have cancelled or scaled down the household's ordinary TV subscription. Another 10% of streaming households are considering a cheaper TV subscription or none at all and many, especially the young, report viewing less ordinary TV after starting to use paid streaming.

The TV Meter survey also confirms that traditional TV viewing declined by 8% from 2012 to 2013. About one third of the households that currently do not pay for TV streaming report that they will possibly or probably begin doing so within the next year, so there may be further consequences on the way.

MORTAL COMBAT OR PEACEFUL CO-EXISTENCE?

TV viewing via the internet is gaining ground, but ordinary TV is still running the show. There is no doubt that the trend can only go in one direction, but the purpose of this article is not to predict when the trend will stabilise and become a new status quo. The objective was to estimate how TV viewing was distributed across various sources of viewing in 2013 – and to otherwise illustrate the difficulties of calculating figures using the available data sources and in light of the unclear definition of what can actually be considered TV.

It cannot be precluded that this article may seem anachronistic in the future. TV is, after all, just TV, regardless of whether it is brought into the home via an antenna on the roof, a YouSee cable, or the household internet connection. The various technologies have different strengths, advantages and drawbacks and merely give us different and additional options for watching the programmes we want to see.

There is little doubt that internet viewing is gnawing away at broadcast TV viewing time and that the industry's business model will have to be continuously adjusted to keep up with consumers. But for users, this is not a matter of a fight to the death between broadcast TV and streaming. Instead, it indicates that the two ways of viewing TV supplement each other rather effectively.

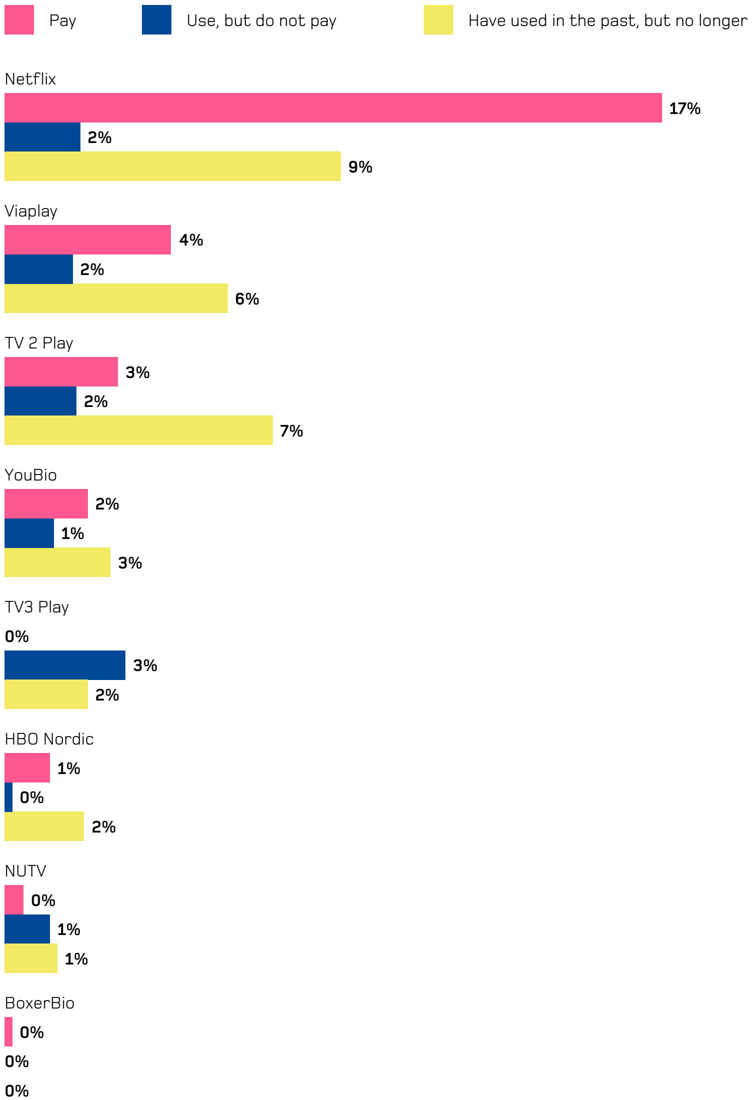
New research from the BBC indicates that streaming and conventional broadcast TV, at least for the present, can easily co-exist. Nearly everyone prefers to watch TV on the big screen and the vast majority begin their TV watching with conventional broadcast, which for the time being enjoys the benefit of having the strongest content. Streaming and on-demand serve as alternatives when broadcast TV offerings do not appeal to viewers or are unavailable for one reason or another. The new viewing options are giving us yet another reason to become choosier consumers.

HOUSEHOLD DISTRIBUTION OF STREAMING SERVICES IN DENMARK

% of households

Target group: All households (respondents aged 18+)

Source: Megafon for DR Audience Research



HAVE A SMARTPHONE

Period: 2011-2013

Target group: 15-70

Source: TNS Gallup Mobile Devices

Women

Men

Women have embraced the smartphone

The smartphone has matured in recent years and achieved wide distribution in the population. The difference between men and women in relation to the use and ownership of smartphones is also vanishing.

By Tina Skov Gretlund and Jacob Lyng Wieland
DR Audience Research

When Apple launches a new iPhone, it is typically hordes of young men with thermoses and sleeping bags who struggle through the night to be among the first to get their hands on the latest model. As a general rule, we typically associate consumer electronics with younger men. But there is much to indicate that male dominance in this area is coming to an end.

When it comes to smartphones, at least, we can talk about a striking development. Women have acquired smartphones to such an extent that equal numbers of women and men now own smartphones. The TNS Gallup Mobile Devices survey shows that 67% of all Danes aged 15 to 70 have a smartphone. The distribution of smartphones had previously been higher among men, but women closed the gap in 2013. That women have caught up with men when it comes to these types of consumer electronics is a new phenomenon.

THE HOLY TRINITY IN 2013: WOMEN, SMARTPHONES AND FACEBOOK

Like men, women use their smartphones for many different purposes. But one thing in particular stands out and that is the use of social media. According to TNS Gallup Index Denmark, women use social media to a greater extent than men and their smartphones are indispensable tools. Women who own smartphones spend a full 53 minutes daily on social media, considerably more than women who do not own smartphones, who spend only 15 minutes a day on the same activities. Men have already fallen behind, as men with smartphones spend 40 minutes daily on social media. Women with smartphones thus spend a full 13 minutes more on social media every day than do their male counterparts.

Facebook is without a doubt the most popular social network. Facebook has meant a lot to the smartphone – and the smartphone has certainly meant a lot to Facebook. Back in 2009, DR Audience Research compiled mobile user profiles. These profiles showed that younger women in particular were very active users of their mobile phones for voice calls and text messaging and active users of social media – on their PCs. With the emergence of easy to use smartphones and much cheaper and more transparent data prices, women have clearly transferred part of their Facebook usage from the PC to the smartphone. In 2013, a full 72% of all female smartphone owners had Facebook installed on their phones. The same figure for men is 64%.

It just makes sense to post up-to-the-minute status updates when it is convenient for you, and you can share pictures taken with your phone in seconds. The phone then becomes the logical hub of the digital part of your social life. The smartphone and Facebook are simply a perfect fit and each has helped the other achieve explosive growth in distribution.

WOMEN DOWNLOAD MORE GAMES THAN MEN

But women also download other apps in addition to social networks. Games are a very popular app category. There has also been a remarkable development in this area over the last couple of years. Gaming as a phenomenon has traditionally been associated with men, but here as well the smartphone has had a strong impact on women's use of games. Up until 2012, more men than women had downloaded apps to their smartphones in the games category, but in 2013 we see that women downloaded games more often than men. WordFeud and Quizbattle are typical games that appeal to women.

The number of apps used weekly has remained stable for the last three years. Danes use an average of 7 apps weekly, with the figure slightly higher for men than for women. This indicates that it is still very difficult to produce one of the apps that actually get used, despite the vast selection of apps now available. As a matter of fact, Danes installed slightly fewer apps in 2013 than they did in 2012. In 2012, Danes had installed an average of 19 apps. The figure for 2013 is 17. There is much to indicate that the number of apps installed on Danish mobile phones is levelling off. This should also be considered in light of that smartphone distribution has become so widespread and there are thus more smartphone users today, who may not necessarily have the same curiosity and consumption patterns observed among early adopters of the smartphone. Men tend to explore the possibilities of the smartphone more than women do and they have on average installed 19 different apps, while women have installed 15.

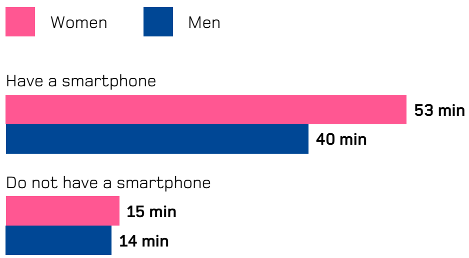
MORE OLDER DANES HAVE ACQUIRED SMARTPHONES

Shifts are occurring in other groups as well, not just women. Smartphones are another device we usually associate with the younger segment of the population. But they are now being joined by the older segment of the population. Nearly half of all Danes aged 60-70 now own a smartphone. This is twice as many as last year, when this could be claimed only for one quarter of this age group. Smartphone ownership is increasing fastest among older women, although men are still the majority in this age group. Usage patterns among older people, however, show that they do not use their smartphones nearly as much as younger Danes do. Older people use their smartphones for activities other than voice calls for only 15 minutes a day, while the same figure for Danes aged 15-24 is just under 2 hours. To a high extent, older Danes thus use their smartphones as conventional mobile phones.

In brief, the combination of usability, cheap data and Facebook has contributed to spreading the smartphone to groups of consumers not typically regarded as technology buffs. This applies to women in particular, who have eagerly embraced the new technologies.

DAILY TIME SPENT ON SOCIAL MEDIA

Period: 2013
Target group: 12+
Source: TNS Gallup Index Denmark



DISTRIBUTION OF MUSIC LISTENING

Period: 2013

Target group: 15-29

Source: Epinion for DR Audience Research

The future in teenage ears

Listeners under 30 now spend more time on music services than on radio and home music collections. A new study from DR Audience Research shows that a paradigm shift is on the way that may make it more difficult for radio to be invited into the lives of young people. In the future, Spotify will compete with radio for background listening, YouTube will compete with radio for the discovery of new music and Facebook will compete with radio for company and news updates.

By Peter Niegel
DR Audience Research

In Media Development 2012, we described how the growing use of streaming services is affecting other music media at the expense of CDs and iTunes in particular, and that music listening on the radio had remained at roughly the same level. The figures for 2013 show that music streaming now accounts for 39% of music listening in the 15-29 age group, while radio has declined to 29%. Among this target group, streaming services have thus overtaken radio as the primary source of music listening.

RADIO IS AN OLD-FASHIONED BOX

Overall, the figures for 2013 also show that radio listening on conventional 'old-fashioned' radios is declining among young Danes aged 15 to 29. However, the study also shows growth in listening on the mobile phone – growth that coincides with a general increase in the acquisition of smartphones in this young age group. The number of smartphones owned by teenagers aged 15 to 19 rose from 42% in 2011 to 86% in 2013. It will be interesting to see whether radio listening on mobile phones will continue to rise as smartphone growth levels off.

TEEN RADIO HABITS ARE ERODING

Teenagers' listening curve over the day echoes the adult curve with the most listening in the morning and afternoon. In our in-depth interviews with 16-19 year-olds, however, it proved that the listening curves reflected time spent with parents in the mornings and afternoons rather than the teenagers' own choice of the radio medium. It is this communal listening that explains why P4 is Denmark's biggest channel among teenagers.

Throughout the day, teenagers consistently listen more to music services and YouTube than to radio. When they do choose radio, they are more likely to choose individual programmes like *Monte Carlo* or *Mads & Monopolet* on P3. There are several reasons for this development, but the decline in radio listening time is attributed mainly to that music listening occurs primarily on the media teenagers prefer: PC and mobile phone. The competition among radio, YouTube and Spotify may increasingly become a contest between three icons on the PC desktop or the mobile phone screen.

STREAMING SERVICES ARE THE NEW SOURCES OF BACKGROUND LISTENING FOR TEENS

The teenage study performed by DR Audience Research shows that YouTube and Spotify fill different functions for teenagers. Spotify and similar music services are being used increasingly to listen to music in the background over extended periods of time, while the user is otherwise occupied on the PC at home or the mobile phone while travelling. In other words, teenagers have Spotify running in the background, which is otherwise considered the hallmark of radio.

The teenage study further shows that the basis of growth in teenage use of Spotify at the expense of home music collections is found in three factors. 1. It is free. 2. There is a huge selection. 3. It is compatible with teenagers' other media consumption: it is shareable and immediately at hand on the PC and the mobile. Music services are such a good fit with teenagers' lives that many even feel that the service has eliminated a previous habit of illegally downloading music. Not because it is more law-abiding, but simply because 'Spotify is so wicked easy,' as one 17-year-old boy puts it.

TEENAGERS DISCOVER NEW MUSIC ON YOUTUBE

In general, Danes still perceive radio as the most important source for discovering new music, but the teenage study shows that young people prefer YouTube for discovering new music. The huge success of YouTube among teenagers is attributed to the service's search function and the opportunity to listen to new music sooner and in a more goal-oriented way than is the case on radio. YouTube is thus also more compatible with teenagers' other media consumption, since everything new from their favourite artists can be immediately shared via fan groups on YouTube and Facebook and because the 'Related Artists' search function means they are always only a click away from the next hit.

Teenagers do consider radio another medium for discovering new music, but also as just a bit old-fashioned since they will still go on YouTube and find the song so they can listen to it again. In other words, they perceive radio as a little slower, a little less convenient and not quite as practical when it comes to discovering new music.

SOCIAL MEDIA COMMUNITIES ARE BECOMING MORE IMPORTANT TO TEENAGERS

The distinctive characteristics of radio may be threatened. In the future, Spotify will compete with radio for background listening. YouTube will compete with radio for the discovery of new music. And Facebook will compete with radio for company and news updates.

The teenage study reveals how much teenagers today are discovering the world through social media accessed via the PC and smartphone. Teenagers always have their smartphones on them. They are always on, always on mute and always have Facebook open. The PC is used constantly – during lessons at school and in the evening while watching TV at home with the rest of the family.

All communication is routed through Facebook. Being part of a group, a community, is all-important to teenagers and nowadays it is Facebook that makes this community available. Facebook is mainly about talking to friends and users share funny media content and everyday news with their friends in closed groups. Radio is not yet a natural part of this huge social media ecosystem. YouTube and Spotify can be shared on Facebook – radio cannot. For this reason, the biggest audio community in Denmark, radio, does not appear as often in teenagers' lives and thus occupies less space in the teenage mind than it did only a few years ago.

AND HOW ARE THINGS WITH RADIO?

Were we not singing the same tune when TV, the internet and the iPod first saw the light of day? Radio has held onto its widespread popularity among the Danish people through all the aforementioned technological innovations. Young people have always been passionate about music and social communities, but we know from experience that this ardour wanes when the teenage years end and the responsibilities of adult life begin. So, will the current generation of teenagers also add the radio medium into the mix when they grow up and their life situations change? Offhand, yes, but there are a few aspects of teenage media consumption that are on a collision course with radio as an analogue broadcast medium.

This generation is the first truly digital generation of media consumers. They do not know and use analogue broadcast media like the rest of the population. They are accustomed to deciding media content for themselves – when, where, how and with whom. For the first time, Facebook, YouTube, Spotify and other social media and music services offer teenagers the same functions and atmosphere that radio has been providing to Danes for 90 years.

Teenage use of social and digital media denotes a paradigm shift in relation to the media behaviour of earlier generations. It is, however, too early to say with any certainty how much this paradigm shift will change listening habits in the future.

About the study

DR Audience Research has followed developments in consumption of audio media among Danes (aged 15-60) through 2010, 2012 and 2013 in three representative CAWI questionnaire surveys, each with about 2,000 respondents. In 2013, DR Audience Research explored the subject in depth among the target group of Danes aged 16-19 by means of a combined quantitative and qualitative study of 100 teenagers' use of radio and other audio media. The objective was to gain an understanding of the media consumers of the future by analysing both their statements and their behaviour.

During the study, the teenagers kept a media log for one week and filled out a detailed questionnaire. Thereafter, 40 respondents were selected for focus groups and 8 respondents were selected for one week of observation and in-depth interviews in the home.

HOW OFTEN DO YOU USE HASHTAGS?

Period: 2013

Target group: 15-69

Source: Norstat for DR Audience Research

#Danishuseofhashtags

The hashtag or # became firmly embedded in the Danish language in 2013 – including in the media. But does actual use measure up to the hype? Far from all Danes use hashtags and those who do are primarily the young. They use them especially on Instagram and many are fond of using unique #hashtagstheymakeupthemselves.

By Tina Skov Gretlund and Mette Birk
DR Audience Research

YOUNG PEOPLE USE HASHTAGS

Many Danes frequently communicate in words and pictures via social media, but how do they navigate the social media landscape? And how do they make sure their own posts are seen? This is where hashtags come into the picture. Hashtags are a form of metadata tagging that helps users tag essential subjects in a post on a social media site.

Hashtags are a relatively new phenomenon and their use is not as widespread as the hype might lead one to believe. Slightly less than 3% of Danes say that they frequently use hashtags; 7% say they use hashtags once in a while and 7% say they use hashtags rarely. In total, only 16% of Danes use or have used hashtags. There is no appreciable difference between how many men and women say that they use hashtags, but there is a distinct age difference. The use of hashtags is being perpetuated very much by young people aged 15-24, of whom more than one out of three report that they use hashtags.

INSTAGRAM IS THE BIGGEST HASHTAG MEDIUM

Although we know that Facebook is beyond compare the social medium that Danes visit most often, it is not where Danes use hashtags the most. Hashtags only recently became part of Facebook communication and user habits do not change overnight. Even Twitter, which truly kickstarted the use of hashtags, is not the medium in which hashtags are used most. The place most Danes say they use hashtags is Instagram. Women who use hashtags are overrepresented on Instagram, while there are more male hashtag users on Twitter and Facebook.

MORE PERSONAL HASHTAGS THAN OFFICIAL ONES

While hashtags on social media were originally intended as a form of metadata tagging, they have recently become a form of expression or a linguistic trend that can be used to describe anything. There is essentially nothing that cannot be written as a hashtag and 40% of hashtag users report that they usually use hashtags that they have made up themselves.

A made-up hashtag can be anything from a single word to an entire sentence, such as #alotofgoodiesifyouusebothhands. But when we ask for examples of hashtags used, a particularly high number use generally applicable themes like #summer or #food. Moods or feelings are likewise frequently used (#happy, #feelinggood), and are seen especially when used to tag pictures on Instagram.

There are several official hashtags that are typically defined by media houses or event arrangers, such as #rf13 for the Roskilde Festival 2013. Only 4% of hashtag users say that official hashtags are the type they use most often and only 23% use official hashtags at all. This equates to that 1 out of 25 Danes aged 15-69 have hashtagged an official event. Of those that have, 79% are aged 15-34. In other words, there is a long way to go before TV programmes, for example, can elicit a response from the general public by using hashtags as an invitation to join in a group discussion.

Hashtags can thus be used to express a mood or emotion. They can be used to express an attitude or join in a group discussion. They can also be a form of statement – a sign that only the individual understands. The use of hashtags is still somewhat variable and confined to only a few. In the year 2013, hashtags are a tool for the young, who are relatively insusceptible concerning how they use them.

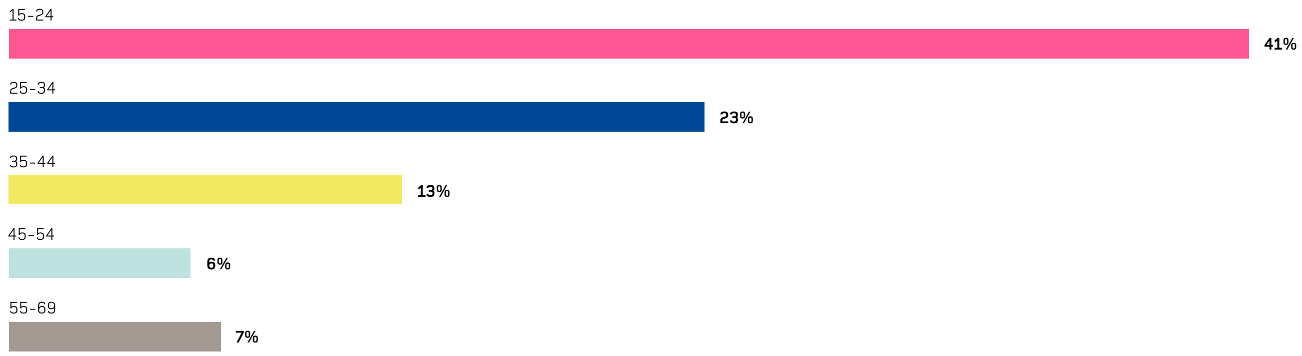
HAVE USED HASHTAGS

Share of the target group who report that they have used hashtags frequently, once in a while, or rarely.

Period: 2013

Target group: 15-69

Source: Norstat for DR Audience Research



#thehistoryofhashtags

In ordinary speech, we call the sign a number sign or pound sign and it has been used for a long time on telephones and in programming languages.

The sign gained its function as a metadata tool in earnest when Twitter began in the late 2000s to link everything written after #. It also became possible to use hashtags on Facebook in the summer of 2013.

HOW DO YOU PREFER TO WATCH TV SERIES?

Period: 2013

Target group: 15+

Source: The DR Panel

Barnaby, Beverly Hills 90210 or binge-watching?

Saturday detective series in the easy chair. Afternoon delight with *Beverly Hills 90210*. *Breaking Bad* on Netflix. Traditions and consumption of fictional series is a varied dimension. With the new alternatives to traditional viewing on broadcast TV, how we view TV series is rapidly changing. DR Audience Research takes a closer look at three ways Danes watch fictional series.

By Mette Birk and Kurt Holm Jensen
DR Audience Research

2013 turned out to be the year when streaming truly set its stamp on Danish media habits. Streaming services are a contributory cause of the decline in broadcast TV consumption and many of the channels that have based a large part of their broadcast line-ups on fictional series were especially hard hit.

The question is whether fictional series can survive on broadcast TV alongside the huge selection of fictional series offered by streaming services, which are making up an increasing share of Danish media consumption. DR Audience Research asked the DR Panel whether they watch TV series in general as well as specifically concerning selected series.

The viewers who answered the survey estimated that in total they easily spend an hour a day watching fictional series. 3 out of 10 say that they watch fictional series via a streaming service at least once a week, usually on dr.dk and Netflix.

But it is particularly notable that only 17% of viewers prefer to watch fictional series via a streaming service, if they have the choice. A full 56%, on the other hand, report that they generally prefer to watch fictional series on conventional broadcast TV. The remainder prefer to watch series that they have recorded from TV, downloaded from the net, or have in their home DVD collections.

But there are large differences in preferences among different age groups. If we look specifically at viewers under 40, streaming is actually about equally popular as watching fictional series on broadcast TV. By a wide margin, viewers over 40 prefer to watch series via traditional broadcast TV. If streaming services are spurring on a new direction in Danish consumption of fictional series, it is, at least for now, occurring primarily among younger viewers.

THREE WAYS TO WATCH FICTIONAL SERIES

In addition to the age differences in platform preferences, there is generally a large difference in how much attention viewers pay to the various series. Viewers concentrate closely when watching a series like *Breaking Bad* while a series like *Venner (Friends)* can easily be watched while doing something else. If you combine concentration with the average age of viewers for the various series in the survey, a clear picture emerges. The series can be divided into three categories with different viewing patterns.

The first type of viewing may be called traditional viewing. Spending time with the family is an important function for viewers in connection with this type of series viewing. This applies to typical series that are popular among older viewers and they can be roughly divided into main categories: Danish drama series like *Forbrydelsen (The Killing)* and *Matador* and the British series and detective shows like *Barnaby (Midsomer Murders)*. In this type of viewing, series are typically viewed via broadcast TV. The viewers often concentrate fairly hard when they watch series this way. Generally speaking, viewers did not report lack of concentration on any of the studied series with an older age profile – perhaps because older viewers rarely multitask while watching TV.

The second type of series viewing is relaxed viewing. This type has a younger age profile and the purpose of viewing is to sit back, relax, and enjoy the light entertainment. This category includes American sitcoms like *Venner (Friends)* and *Two and a Half Men*, American crime dramas like *CSI* and romantic dramas like *Greys hvide verden (Grey's Anatomy)*. The series are often used only as a backdrop for other activities and the viewers' attention may be focused on their PC or perhaps the meal they are cooking. The level of concentration is generally lower for series viewed this way. Relaxed viewing is usually via broadcast TV, although it may also occur in other ways. Viewers do not necessarily watch every episode or view them in sequence.

The last type of viewing may be called in-depth viewing and the function for the viewers here is to become more deeply involved in the fictional universe

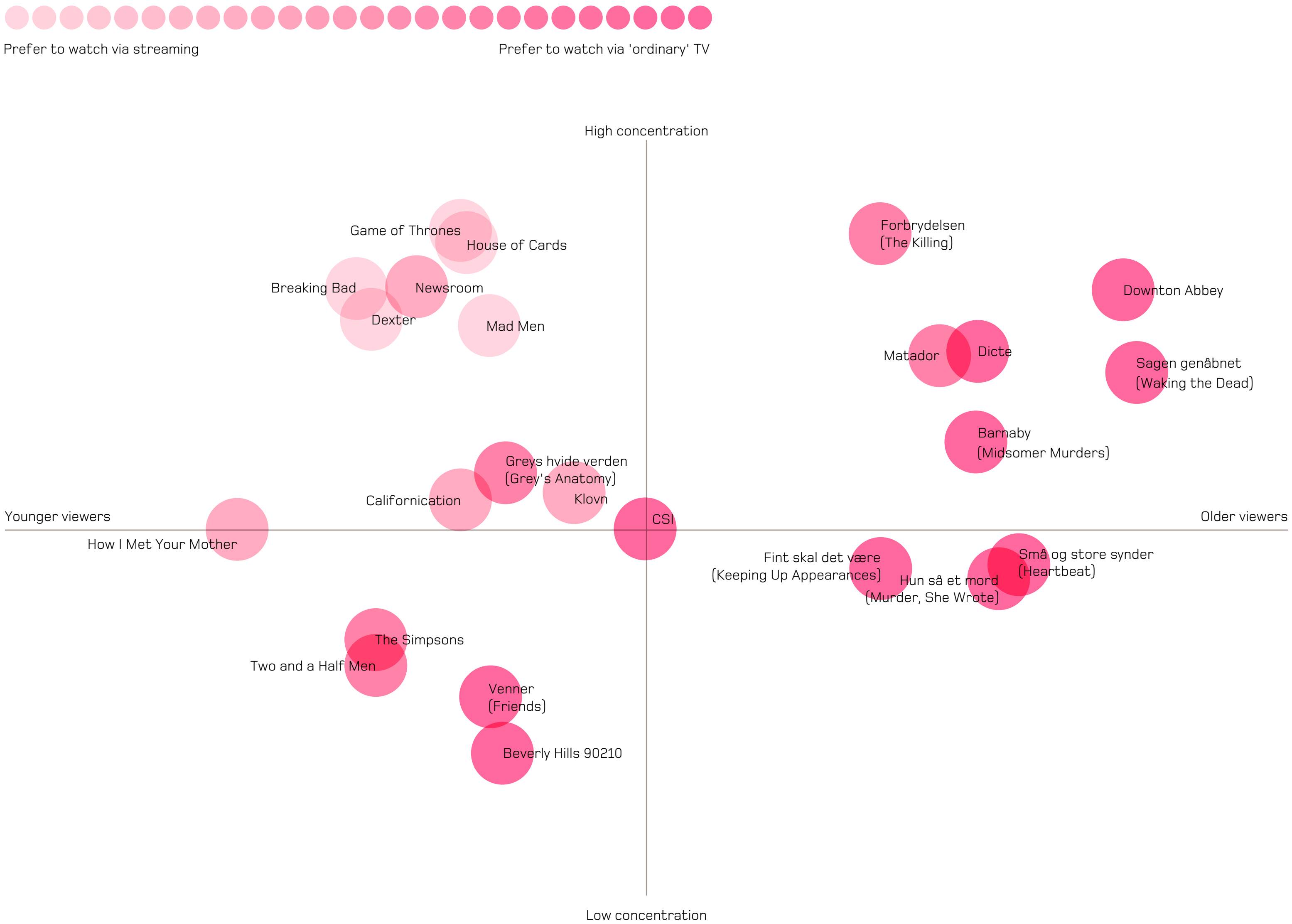
CONCENTRATION LEVEL VERSUS AVERAGE AGE

Concentration refers to the respondents' estimation of how concentrated they are when they are watching a specific series.

Period: 2013

Target group: 15+

Source: The DR Panel



of the series – similar in many ways to how readers get lost in a good book. It is here that we find the American high-end drama series like *Game of Thrones*, *Breaking Bad* and *House of Cards*. The age profile for this type of series viewing is relatively young and the level of concentration very high. The series typically have a relatively small but extremely dedicated fan base. These viewers watch almost every episode in sequence and often watch several episodes at a time. This is the consumption pattern that became popularly known in 2013 as 'binge watching', a phenomenon especially characteristic of this type of series viewing. Unlike the other two types, a significant share of viewing in this category occurs via streaming services. Streaming is a good fit for this type of viewing because it gives viewers with busy lives maximum freedom in how and when they watch, which is necessary for these series in order to become deeply involved.

It should be emphasised that the same series may, in theory, be viewed in all three ways and likewise that the same viewers may watch series in all three ways. The division should thus not be understood as a model in which either series or viewers are categorised. It is rather a division of consumption patterns and the functions of series viewing, which taken together may add nuance to our understanding of the consumption of fictional series in a new media reality.

THE FUTURE OF FICTIONAL SERIES

What is the likely fate of fictional series on broadcast TV, now that streaming services have penetrated the Danish market? Of the three viewing types outlined above, it seems that in-depth viewing is primarily the type where streaming may become the most significant distribution form within the foreseeable future. For both traditional viewing and relaxed viewing, there are still many good reasons for viewers to choose broadcast TV and these types combined make up by far the largest share of series viewing on Danish broadcast channels.

Many of our surveyed panellists mention that series on broadcast TV are often better as a vehicle for spending time with others, which is to them an important aspect of series viewing. This applies primarily to the cosy togetherness with the family, which often functions as a familiar and well-structured ritual. The bonding function of the series may even in some cases reach beyond the walls of the home. Chat about the series over the breakfast table the next day is meaningful to viewers. In addition, for the series with the highest ratings, there may be a sense that the entire nation is sitting down on the sofa at the same time and sharing the experience.

Many viewers also prefer to simply sit back and let themselves be entertained. They do not have to first choose or agree on the perfect elements of the TV evening – others have already selected and composed a handful of good and entertaining programmes for them. With a simple click of the remote control, the entertainment instantly begins.

But as mentioned, streaming has several advantages in terms of in-depth viewing. In many ways, we can say that streaming services give the series that require in-depth viewing an optimal distribution platform. The American high-end drama series have, as a genre, never done particularly well on Danish broadcast TV, but with the advent of streaming services, this type of series has found a natural place in the media landscape and Danes have gained a new way to watch fictional series.

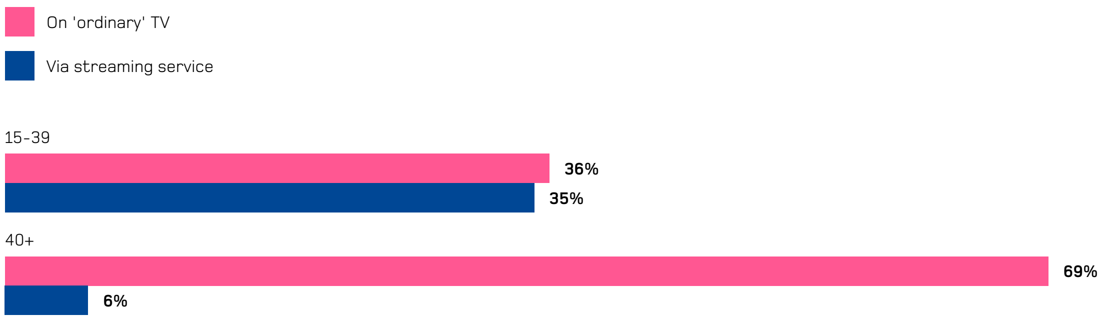
Fictional series via streaming should thus be regarded as a supplement to the selection of fictional entertainment that we had before, rather than a replacement. It also means that streaming services are going to take up a good portion of Danes' time in the future and will thus have an impact on time spent on broadcast TV. But since fictional TV viewing also functions as a bonding mechanism and as a way to relax, fictional series still have a viable place on broadcast TV.

WHICH WAY DO YOU PREFER TO WATCH TV SERIES?

Period: 2013

Target group: 15+

Source: The DR Panel

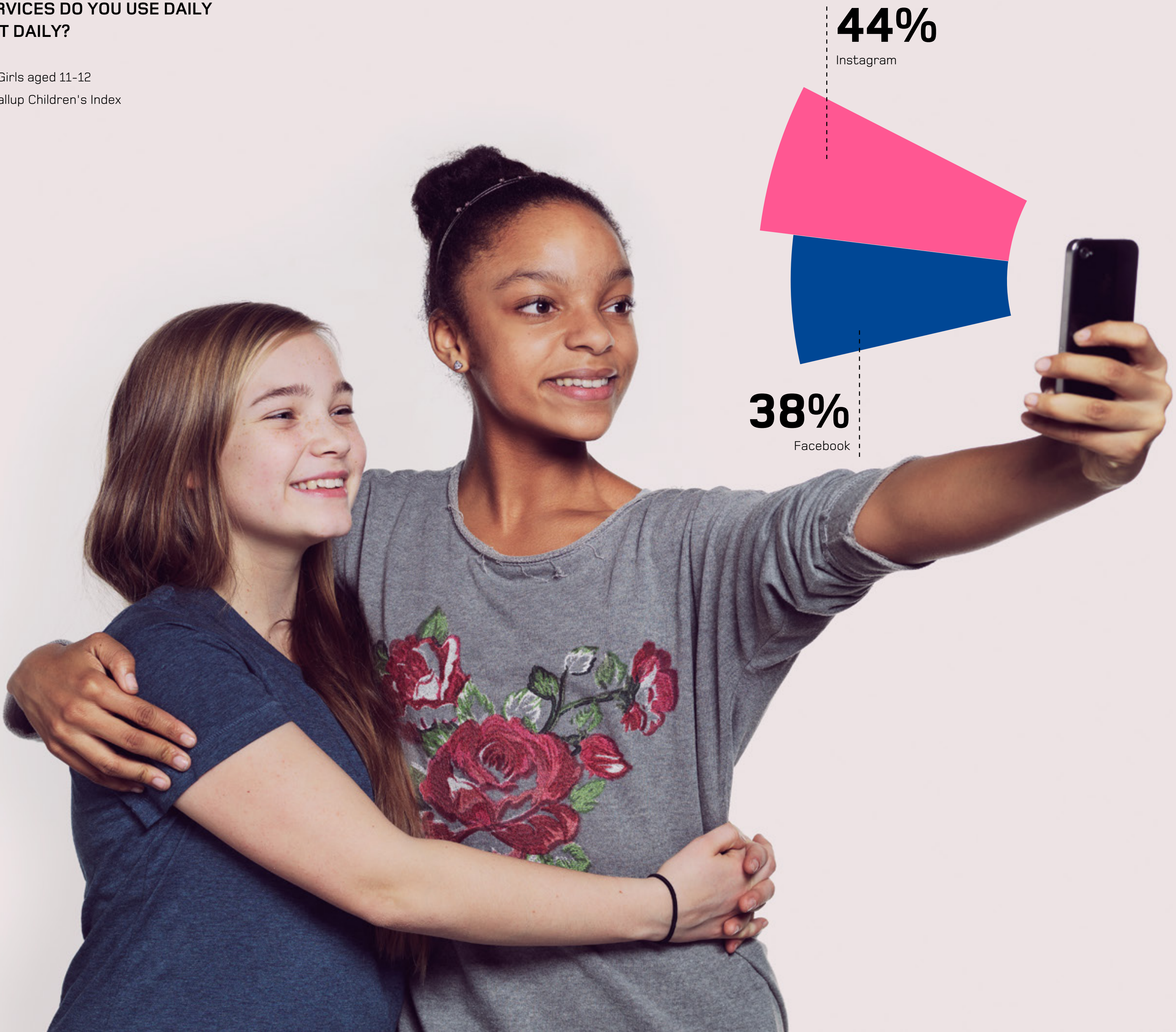


WHICH SERVICES DO YOU USE DAILY OR ALMOST DAILY?

Period: 2013

Target group: Girls aged 11-12

Source: TNS Gallup Children's Index



Tweens – between games and social media

'Kids grow older younger' has become a mantra in the public debate. The media, and especially social media, have been accused of being accomplices in this development. A new study, however, shows that very few children in the 7-12 age group are active in social media, other than the oldest girls, and that interest in social media is awakened through games.

By Tina Skov Gretlund and Lene Heiselberg
DR Audience Research

There are significant differences in interests, preferences and media function among children aged 7-12. There is a wide gap between the 7-year-olds, who are mainly interested in playing with Beyblades and Barbies, and the 12-year-olds who would rather go to cafés and shopping with friends.

The survey, performed in autumn 2013 by TNS Gallup and DR Audience Research in partnership with the Media Council for Children and Young People shows that there are large differences between boys and girls in terms of access to and use of social media. This is particularly evident in the evolution that children undergo from being uninterested in social media to finally becoming heavy consumers.

THE GIRLS' PATH FROM GAMES TO SOCIAL MEDIA

GIRLS AGED 7–8

The game habits of the youngest girls involve exclusively the game itself, and there is significant social interaction associated with how these girls play games. The girls have avatars, figures in a virtual world, that they choose to design in their own image, and many popular games are focused on taking care of these avatars. Feelings are at the centre of things and it is the emotional aspects that are appealed to when the girls receive reminders from their game. As one girl puts it: 'Remember to feed your horse, or else it will die.' The most widespread games among this part of the target group are MovieStarPlanet, Littlest Pet Shop, goSupermodel, Hay Day and, to a certain extent, Minecraft.

GIRLS AGED 8–9

The 8 to 9-year-old girls play the same games they did when they were aged 7-8, but the way they play has changed. They no longer play exclusively for the sake of the game and social interaction with others begins. This development may be regarded as the first step towards social media. Girls in the 8-9 age group still do not use the more familiar social media brands, but the way they interact with each other in the games is more reminiscent of involvement in social media than game-playing. The game itself thus fades into the background and the game becomes a platform for meeting and chatting to close friends.

GIRLS AGED 9–10

Girls aged 9-10 still play, and the games fill an important role in relation to their social lives. During this period, the girls also begin to establish their first profiles on the more well-known social media sites. They typically debut on Instagram and several also mention Snapchat as a social medium they use. It is typically humorous content that appeals to them and draws them into trying Instagram, Snapchat or Vine, where one girl uploaded short video clips of her cat, for instance. At this age level, a few already have a Facebook profile, but this is not something they use particularly actively and it is typically their parents who control who they are allowed to 'friend'. Another example of the initial use of Facebook is that the school class has a group where they can post shared information.

GIRLS AGED 11–12

Many girls in this age group are fully involved in using social media and have moved away from the games they formerly used as social tools. Girls in this age group are typically on several different social media sites. Instagram is without a doubt the most popular social media site and according to the TNS Gallup Children's Index, 44% of girls aged 11-12 visit Instagram daily or almost daily. Instagram appeals to the target group because they communicate with pictures and video instead of written language. Many of the girls have a Facebook profile and 38% say that they check Facebook daily or almost daily. There are also examples of girls whose parents object and require the child to wait until she turns 13, which is Facebook's official minimum age. One important reason the girls are so active on social media is that more than half own their own smartphones, which make it possible to check social media updates constantly.

THE BOYS' PATH FROM GAMES TO SOCIAL MEDIA

BOYS AGED 7–8

The youngest boys are obsessed with playing games. They play exclusively for the sake of the game and are very committed to improving their skills and moving up levels in the game. They talk in the classroom about how far they have progressed in the various games and a high level of achievement in a game is associated with high status. The most widespread games are Minecraft, Clash of Clans and related war and strategy games. These games often have chat functions but the boys do not use them. They know the social media sites by name, but have no plans to become active users of social media.

BOYS AGED 9–10

The boys are still mainly preoccupied with the game itself, but it is also at this age the boys begin to communicate with each other while they are playing. The communication is devoted exclusively to the game they are playing and thus differs markedly from the girls' interaction with each other at this age. Communication among the boys may occur in several different ways. Boys often sit together while they are playing, but they also commonly communicate with each other via Skype or various chat functions. Several boys express that it is important that they can access the internet precisely so they can 'talk' to each other while they are playing and the communication is perceived as added value. Few boys in this age group are involved in social media, but only so that they can play the games accessible on the sites, such as Minion Rush. For this age group, the social media are thus not used exclusively in social contexts and the boys are still not eager to establish social media profiles.

BOYS AGED 10–12

Boys of this age still play frequently and are still preoccupied mainly with the games. They do many things at the same time: they play games, they Skype and they chat – all with one clear goal of improving their game skills. Some of the oldest boys are starting to chat about things unrelated to the game, but the chat still has more of a practical than a social dimension, such as 'Do you want to hang out?'

It is also at the age of 10-11 that a few boys begin to establish profiles on social media sites. Few boys mention Instagram as the social media site they spend the most time on. The use of social media has only just begun and several create profiles because others in their class have one. They post pictures and short texts and go to the site to check and 'like' posts about once a day. According to the TNS Gallup Children's Index 2013, 9% of boys aged 10-12 are on Instagram daily or almost daily. A few have a Facebook profile, but it is still mainly in name only, since they do not actively use their profiles as a social medium. In this age group, 25% say that they visit Facebook daily or almost daily. One or two of the older boys are starting to look forward to getting a Facebook profile so that they can 'join in real conversations.'

THE GIRLS ARE A STEP AHEAD

As in many other areas of development, the girls are also a step ahead of the boys in the social media world. This is perhaps even clearer in relation to social media because it is precisely the social aspect that drives social media consumption and the girls are more interested in this than the boys are. In addition, it is a well-known fact that girls acquire written language skills earlier than boys and there is no doubt that this is significant to their interest in Facebook. However, one thing boys and girls have in common is that gaming leads them towards social media, albeit via different paths. Although many claim that 'kids grow older younger', this study shows that interest in the game itself is much more dominant in this age group than, for example, interest in self-staging on social media sites. And thus, play is a highly dominant factor in the target group's interactions with digital media.

About the study

Qualitative interviews, observations and online community with 24 children aged 7-12 who reside on Sjælland and in Greater Copenhagen.

The study was performed by TNS Gallup and DR Audience Research for the Media Council for Children and Young People and DR Media in October 2013.

The supplemental quantitative results in the article were taken from the TNS Gallup Children's Index 2013.

METHODOLOGICAL CONSIDERATIONS, CONDITIONS AND RESERVATIONS

It is not easy to estimate the scope of internet TV viewing. Nonetheless, DR Audience Research makes the attempt in the article 'Netflix is the sixth-largest TV channel in Denmark' on page 30. In this appendix, we describe the many methodological considerations upon which the article is based.

- More than one source was used for 4 out of 7 types of viewing in the estimation. In these cases, this involves either pure or calibrated average figures.

- 'Claimed' measurements, that is, asserted or perceived behaviour rather than electronic registration, which we are familiar with from TV, radio and internet measurements, may overestimate socially attractive behaviour. For example, when the radio survey switched in 2008 from claimed to electronic measurement, it proved that P1 listening time had been overestimated by one third. Apart from the TV Meter survey's ratings, the primary data sources in the article are claimed measurements. But in the absence of an accurate answer key, it is of course impossible to establish the 'P1 factor' for Netflix, YouTube, or general internet viewing. When a similar measurement switch was carried out in Sweden, no 'P1 factor' was recorded, which indicates that local and cultural differences also play a role.

- Different question techniques in different surveys require different calculation methods – and can, of course, also produce different answers. In the DR Audience Research Megafon survey, time spent is measured as claimed behaviour yesterday, while the Gallup Digital Life survey measures claimed viewing the last time the respondent used a service. In the first instance, time spent can be calculated immediately, but in the second instance, usage frequency must be brought into the calculation.

- Several of the data sources include figures for dissimilar random samples – one survey age range is 15-70, for example, another one is set at 15-74 and a third is set at 18+. Likewise, the 'youth' age ranges may be either 15-29, 15-30, or 18-30. In these cases, the age difference in the results from one measurement are used to estimate across measurements. In order to estimate results for the entire population, even though the surveys were carried out among adults, the calculation uses the knowledge about children's net viewing behaviour based on responses from their parents.

- The TV Meter measurement category of 'undetermined viewing' (about 4% of official TV viewing), which cannot be ascribed to specific channels, also includes viewing of, for example, Netflix via a PC temporarily connected to the TV set or via smart TV apps. There is thus risk of a minor element of double counting, since this viewing should also be covered by the claimed measurements. The scope is limited but unreliable and no attempts have been made to correct this in the calculation.

- Double counting must also be taken into account in other ways. For the purposes of the estimation, 'on-demand viewing' has been defined, as mentioned, as 'viewing via the internet of programmes or programme clips live or within 7 days/before/after the live broadcast time on broadcast TV.' But since the category of streaming services other than Netflix also includes streaming provided by Danish broadcasters (TV 2 Play, Viaplay, TV3 Play and nutv), which viewers can also watch on-demand within 7 days of the broadcast time, it was necessary to downwards adjust the streaming time for these sites. In the absence of reliable knowledge, these services are calculated as 50% on-demand and 50% streaming, with the latter correspondingly adjusted downwards because on-demand viewing has already been counted once.

- It is notoriously difficult to uncover illegal behaviour, and especially so via claimed measurements. There are few current sources of useful knowledge about pirate viewing in Denmark, but that does not make it any less relevant to the behaviour the article describes. We arrived at the percentages for pirate viewing by comparing the claimed share from the YouGov fictional TV viewing survey with the claimed share for fictional TV viewed via ordinary TV channels, recalculated as absolute viewing time based on the TV Meter survey's measured fictional TV viewing time on the channels offered by the four largest Danish stations (which account for about 80% of total viewing time). The underlying assumption is thus that pirate viewing is dominated by fictional content, but it must be acknowledged that this ignores other illegal viewing, for example, of football and pay-per-view boxing.

- Conversely, the percentage for DVD viewing is estimated based on the TV Meter survey's measurement of DVD usage, calibrated with the claimed share of fictional viewing from the YouGov survey, partly in order to increase reliability by using two sources and partly to minimise the risk of double counting viewing, as some DVD players can also be used, for example, for Netflix viewing, and of course viewing of home videos and other irrelevant content. Otherwise, some usage of game consoles was also registered as DVD use in the TV Meter survey, for purely technical reasons.

- YouTube is the most difficult dimension of all, but is too significant to ignore. Firstly, the total viewing time per Dane is based on claimed measurements. Secondly, far from all YouTube viewing is relevant when focus is on content that has been, is currently, will be in the future, or could have been broadcast as conventional broadcast TV. In the present calculation, we arrived at the YouTube share of viewing on the basis of claimed time spent, which was subsequently downwards adjusted based on the authors' qualitative evaluation of which of the 22 YouTube content categories used for a survey of the DR Panel that can be considered 'TV-like.' The 10 categories: film, commercials/marketing, animated film, news, politics, sports, TV series, TV programmes/TV programme clips, comedy/humour/stand-up and music videos – account for 43% of YouTube videos viewed by Danes. Accordingly, 43% of YouTube viewing time is included in the calculation. It should be mentioned, however, that the two largest categories, comedy and music, are included only at half their weight because it was judged that far from all humour content on YouTube is TV-like, just as a great deal of music on YouTube is uploaded without video and in any event is listened to rather than viewed. The validity of the calculation is dependent upon that the average clip length, or in any case clip viewing time, is the same across categories. An American estimation performed by Sysomos indicates that this is a reasonable assumption. It should thus be emphasised that the estimated share does not include all YouTube content but only the 'TV-like" portion of YouTube.

- The measurements behind the official market values also have acknowledged errors and shortcomings. For example, the TV Meter survey is weighted up to cover the entire population, thus also including the small segment of the population that either does not have TV in the household or lives in a type of household (for example, a prison, nursing home, or college) that does not participate in the survey. On the other hand, it must also be acknowledged that guest viewing in the TV Meter is not adequately accounted for in relation to the share of Danish TV viewing that occurs outside the home, including viewing in summer cottages. The TV Meter survey's recently implemented Virtual Meter technology could not contribute to the article for two reasons. First, it only covers the last month of 2013 and secondly, its market coverage is incomplete with regard to market players and technologies. Like Virtual Meter, the Gemius internet measurement also presents challenges in relation to tablet computers and mobile phones. In addition, the design is such that it ignores the circumstance that some internet viewing is engaged in by several people at once watching the same screen. Consequently, for this article, the Gemius measurement is used only as a reference point and not as a data source.

Type of TV viewing	**Data source(s)**
TV live	TNS Gallup TV Meter
TV time-shifted +7 days	TNS Gallup TV Meter
Netflix	Megafon/TNS Gallup Digital Life
Other streaming TV services	Megafon/TNS Gallup Digital Life
On-demand TV +/- 7 days	TNS Gallup Digital Life
YouTube TV content	DR Panel/TNS Gallup Digital Life/Sysomos
Pirate viewing films/TV series	YouGov/TNS Gallup TV Meter

Legally responsible editor

Audience Research Manager

Lars Thunø – lath@dr.dk

Editors

Henrik Gregor Knudsen – hekn@dr.dk

Kurt Holm Jensen – kuhj@dr.dk

Contributors

Dennis Christensen – dech@dr.dk

Henrik Gregor Knudsen – hekn@dr.dk

Jacob Lyng Wieland – jacw@dr.dk

Kurt Holm Jensen – kuhj@dr.dk

Lars Thunø – lath@dr.dk

Lene Heiselberg – lehe@dr.dk

Marianne Bjørn Jørgensen

Mette Birk – mbir@dr.dk

Michael Oxfeldt – miox@dr.dk

Niels Marslev – nima@dr.dk

Peter Niegel – petn@dr.dk

Sofie Scheutz – sofi@dr.dk

Tina Skov Gretlund – tigr@dr.dk

Uffe Høy Svenningsen – uhsv@dr.dk

Data sources

Epinion

FDIM

Gemius Denmark

Megafon

Norstat

Sysomos

TNS Gallup Annual Survey

TNS Gallup Children's Index

TNS Gallup Digital Life

TNS Gallup Index Denmark

TNS Gallup Mobile Devices

TNS Gallup Radio Meter

TNS Gallup TV Meter

YouGov

Other sources

BBC

mediawatch.dk

sbsradio.com

The DR Panel

The data in this publication is also derived from surveys performed in DR's own internet panel, the DR Panel. DR uses the DR Panel to regularly survey Danish media consumption habits and opinions about media content. Anyone resident of Denmark aged 15 or older may become a member of the DR Panel. You can join the panel and read more about it online at *www.dr.dk/drpanelet*

About DR Audience Research

DR Audience Research is DR's own research department. It is an independent department tasked with providing the perspectives of listeners, viewers and users on DR's wide range of products and with tracking media development.

Contact details

DR Audience Research

DR Byen

0999 Copenhagen C

More info online

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