



# **MEDIA DEVELOPMENT 2019**

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

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## About value and volume

It buzzes and hums in the pockets of the Danes. The eternal battle for the users' attention has gradually had the result that we have started removing the worst disturbances from our mobiles. Notifications may be a good thing as long as they provide value and are relevant, but it is also found that far from all disturbances are worth the attention.

Because what is actually worth the time?

BY DENNIS CHRISTENSEN

When glancing at my mobile, the first thing I see is the breaking news about Brexit. Before I even get to open the news, the notification is replaced by a reminder from my calendar about a meeting. Both Instagram and Twitter also want my attention, and on Messenger I have received a message from my wife. When I open the phone, the red notification circle lights up on a myriad of apps: unread podcasts, unread emails, missed Messenger messages, and new suggestions to series and films on Netflix.

*It gives us a good conscience because we have prioritised the time for it and we get more than just the headline. In other words - it gives us value.*

DENNIS CHRISTENSEN, HEAD OF DR AUDIENCE RESEARCH



At a time where we Danes are updated with more information than any other generation, we also experience a paradoxical feeling of being at the tail end. All the world's websites, apps, streaming services, music services and flow channels offer their content in an inexhaustible media buffet where nothing is missing. Except maybe mental bandwidth to grasp it all.

Primarily digital news sources fill the Danes' news consumption. But when looking at which news sources the Danes find most important - and most credible - it is still the traditional media in the form of television and radio that the Danes value most. This relationship may certainly be explained by the analogous nature of the media: As we scroll down our Facebook wall, we are

filled with stories and headlines from news we rarely get to read. But when we watch the news on TV, stream a debate or listen to P1's podcast Orientation, we have chosen it ourselves, and it has our primary focus. It gives us a good conscience because we have prioritised the time for it and we get more than just the headline. In other words - it gives us value.

And just today, value is more in focus than ever. Because while notifications fill our phones and digital news fills our feeds, we have gradually realised that sometimes it may be necessary to hit the brakes. To keep track of how much time we spend on

social media. To watch, listen and read the news from sources we trust. To get help sorting through the huge amount of information and finding what really gives us value.

The first experiences with DR's new value goals show that there is actually no strong correlation between the time we spend on media and the value we get from them. The short, sharp podcast may provide just as much value as a full week of social media consumption. This is also reflected in the fact that older people do not necessarily experience greater value in media use than young people - although older people generally have a significantly higher media consumption. Value for the individual cannot be read in minutes, shares and likes, and therefore we must think value over volume.

By 2020, a new media settlement will most likely see the light of day, and as a result of the conflict between YouSee and Discovery combined with the savings plan at DR, many Danes will find that they have fewer TV channels to choose from. Less volume in the TV market will have the result that more people will use streaming and the value of the content will become increasingly important. You can read about this and much more in this year's edition of the Media Development. With these words, I hope you will enjoy reading the Media Development 2019!

DENNIS CHRISTENSEN, HEAD OF DR AUDIENCE RESEARCH



2019

## Calm before the media storm

2019 saw conflicts between major players, announced savings plans and a changed political majority. But even if the media sea lapped in 2019, the storm will undoubtedly intensify in 2020, with the consequences seriously affecting the users. In the midst of the rough sea, the Danes, young as well as older, change their habits and become more digital in their media consumption.

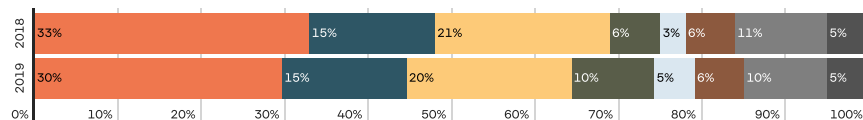
BY DENNIS CHRISTENSEN & HENRIK GREGOR KNUDSEN

Danes spend more than seven hours daily on media. Even if you take into account that part of the usage is overlapping - for example, checking your Facebook profile while watching The Great Danish Bake Off - the consumption is still very high. In fact, the time consumption is so high that it is difficult to imagine any significant increase in consumption, as long as there should be time to work and sleep as well. So this is still a zero-sum game where the various media fight for the same minutes.

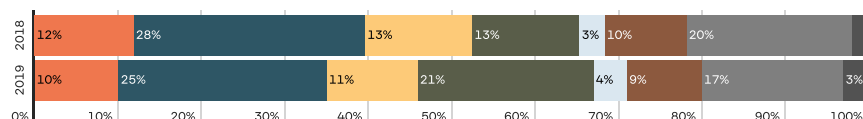
There are no significant shifts between the various media categories in comparison with 2018, but nevertheless the media development can be clearly read. The traditional media still account for the majority of the Danes' time spent on media and take up more than half of the minutes that the Danes spend on a daily basis. The reason for the continued dominance is, among other things, that older Danes, who have a more traditional media consumption and take on new offers more slowly than young people, continue to form the largest part of the population. However, this year the traditional media are losing ground to TV content streaming as well as radio, music and podcast streaming, which accounts for a quarter of the time spent by the entire population and about half of the time spent by the 15- to 31-year-olds. The biggest increase is seen in audio streaming, which now accounts for 10% of the total media consumption among the entire population.

### Distribution of the Danes' media use

#### 15-75 years



#### 15-31 years

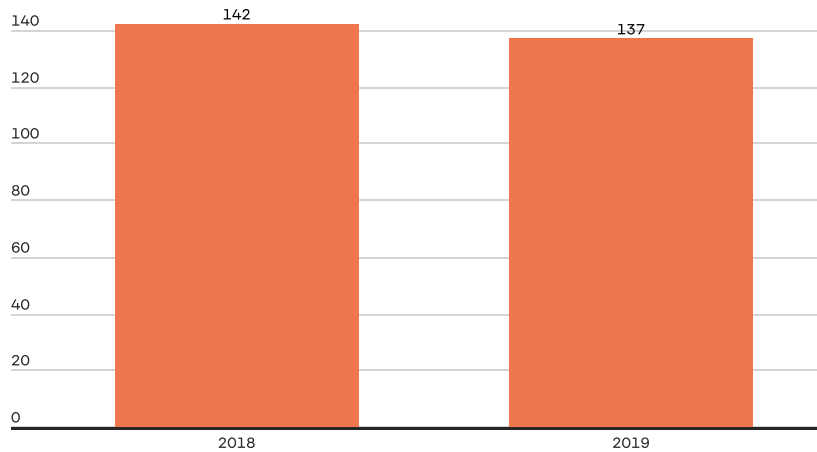


● TV 
 ● Streaming TV content, films and clips 
 ● Radio 
 ● Streaming radio and music 
 ● Read news on the web 
 ● Games and gaming on the web 
 ● Social media 
 ● Printed media

Source: DR Media Research  
 The estimate is based on a variety of sources, including the official market measurements on radio and TV - but also a number of questionnaire surveys, where time consumption is not measured directly but calculated on the basis of the replies from the respondents.

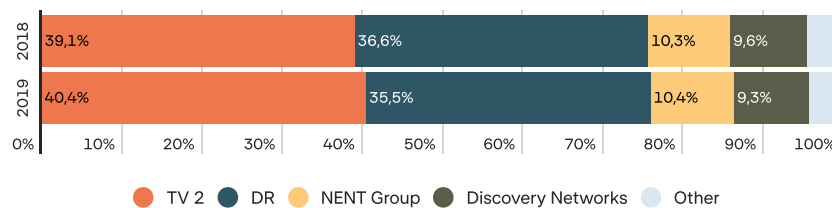


## Time spent daily on TV



Target group: 3+ years, Source: Kantar Viewer Study, Data: Live + VOSDAL + TS

## Share of viewers distributed on channel families



Target group: 3+ years, Source: Kantar Viewer Study, Data: Live + VOSDAL + TS

Although age still plays a crucial role in the use of media, it is clear that age can no longer explain everything. Just as there are young people, who still watch traditional TV and read newspapers, there are older people, who have long since said goodbye to the cable package and who have thrown themselves over the bulging content lists from the streaming services. In addition, among both adults and older Danes, there is a rather large difference in how media are consumed when, for example, taking social class into consideration, which can be determined by, among other things, looking at education and income. For example, the lower social classes stream far less than the higher social classes.

## New conflicts in the TV market

The consumption of traditional TV fell again in 2019, and the Danes now watch an average of 2 hours and 10 minutes of TV per day. However, around 10% of the time spent is up in the air in 2020. This is the proportion of the TV viewing that in 2019 took place on the flow channels, which DR has closed down, as well as YouSee customers' use of Discovery Networks channels. Some viewers are likely to replace their consumption of one channel with another, while others will reduce their TV usage when the supply of channels declines.

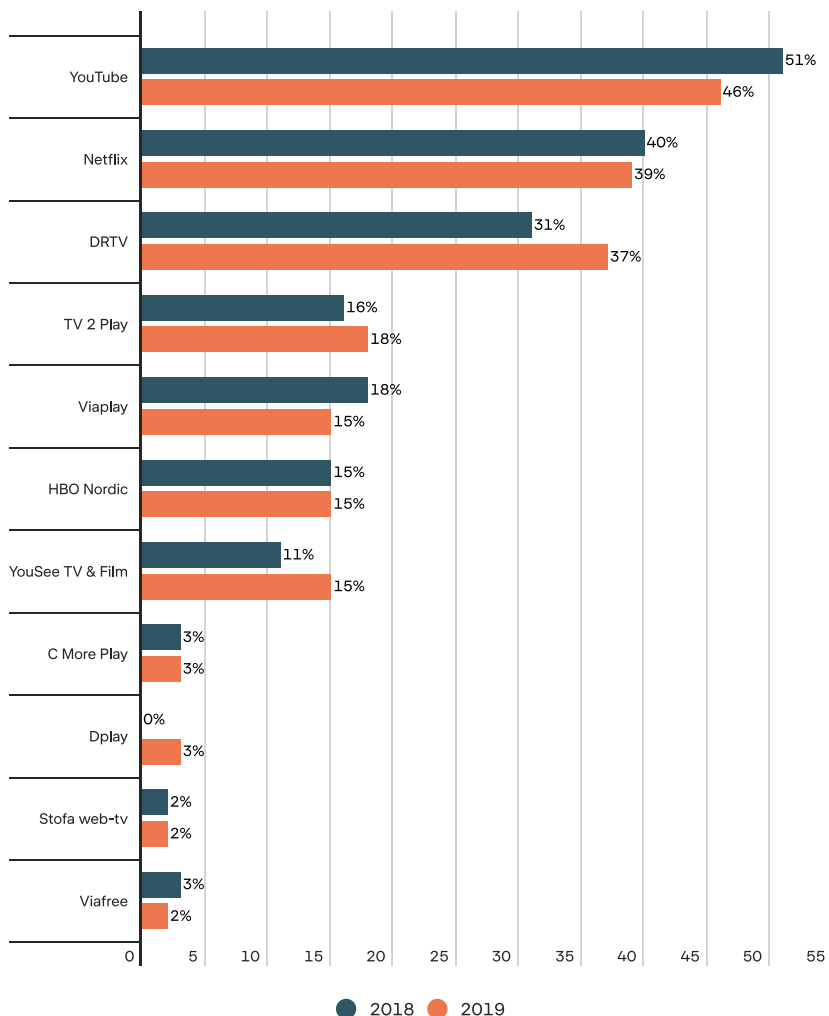
“  
Only few users have  
all their needs met  
through a single  
streaming service...”

DENNIS CHRISTENSEN & HENRIK GREGOR KNUDSEN,  
DR AUDIENCE RESEARCH

At the same time, the conflict between YouSee and Discovery Networks has led many to consider their TV package. Some have chosen to switch to another TV provider, while others have chosen to completely cut the cable and replace the classic flow packages with streaming services. It is still premature to conclude on the effects of these changes, but there is no doubt that it will negatively impact the consumption of traditional television and cause even more Danes to stream.

In 2019, 51% of the Danes stream film and television content at least weekly, compared to 48% in 2018. The market is dominated by six services with YouTube, Netflix and DRTV at the forefront, just a short distance ahead of TV 2 Play, Viaplay and HBO. Most young Danes continue to stream, but more

## Weekly users of streaming services (top 11)



Target group: 12+ years. Source: The figures for DRTV have been calculated using data from Kantar, which on behalf of DR Media Research is continuously conducting a coverage survey. The figures for DRTV cover all of 2018 and 2019. The other figures are from Kantar Index Denmark 2nd + 3rd quarter and 1H 2019.

and more older people are joining the streaming wave, and when they first start streaming Hammerslag, The Crown and Badehotellet, the figures suggest that they spend as much time on the streaming services as the younger part of the population. You can read more about this in the article Record number of mature streamers.

Like the traditional TV market, the streaming market is a patchwork. Only few users have all their needs met through a single streaming service, and most of them therefore choose to combine the various services crosswise. On average, the 15- to 31-year-olds use between four and five services, while the number of streaming services decreases with the age of the users. The 10 most used streaming services alone are included in 40 different combinations, of which Netflix is included in 31 of them, followed by DRTV with 24. New combinations will be possible in 2020, when, among other things, Disney+ will probably be launched in Denmark. You can read more about this in the article The path through the streaming jungle.

Dying animals bite at their own wounds, and it is clear that the changing consumption habits in the TV market are creating divisions between the various parties. In the past, distributors and TV channels have stayed on their own half of the field, but now TV 2 has also become a distributor with the streaming service TV 2 Play, while YouSee has become a broadcaster with the TV channel Xee. The conflict axis is most evident between YouSee and Discovery Networks, but DR has also been hit, for example, as DR2 has had to move from channel number 2 to number 19 at YouSee to, among other things, make room for YouSee's own channel Xee. The move resulted in a decrease in DR2 time consumption of more than one quarter among YouSee customers, while YouSee customers' overall TV usage declined only slightly. However, from the start of 2020, the DR2 is again among the top channels at YouSee.

## New radio waves on the air

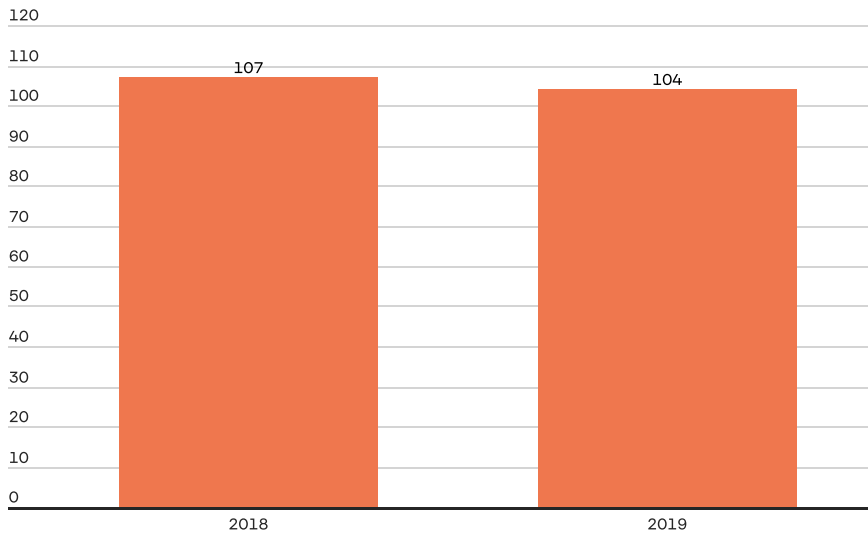
2020 will also give lappings in the sound waves. New content will be heard, and goodbye is being said to some other. In November in the radio market, the Danes said goodbye to Radio24syv, and at the same opportunity they were able to get acquainted with the replacement, Radio4, for the first time. In its first months, Radio4 has had 411,000 weekly listeners. This contrasts with Radio24syv, which in its last year had a weekly audience of 557,000. To be right and fair it should be mentioned that even in the radio market, all beginnings are difficult, and Radio24syv initially started off with a more modest number of listeners, which subsequently increased. So far it can be established that where Radio24syv in its listener profile somewhat reflected the population in relation to regions, Radio4 is slightly weaker among listeners in the metropolitan area.



*In 2019 there was quite a lot of noise about the allocation of a DAB frequency to Radio LOUD, which finally ended up in the decision that Radio-24syv will not continue.*

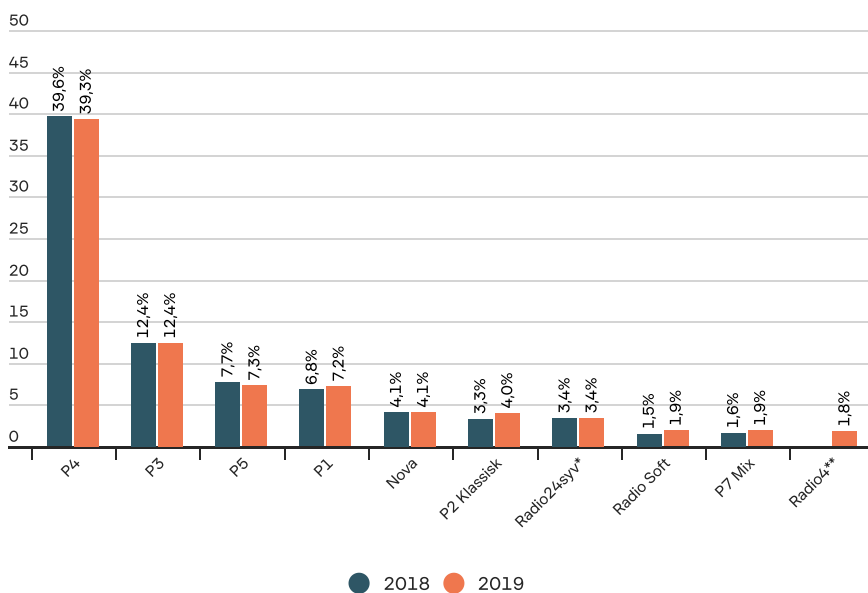
DENNIS CHRISTENSEN & HENRIK GREGOR KNUDSEN,  
DR AUDIENCE RESEARCH

## Time spent daily on radio



Target group: 12+ years, Period: 2018-2019, Source: Kantar Radio-Meter

## Share of listeners distributed on channels



Target group: 12+ years, Source: Kantar Gallup Radio-Meter  
\* Up to and incl. week 44 2019  
\*\* As of week 45 2019



At the end of 2019, P7 Mix closed while P6 Beat and P8 Jazz have been given another year of broadcasting so far. This is surely quite a relief for the 236,000 listeners, who listen to P8 Jazz or P6 Beat weekly, while the 467,000 weekly P7 Mix listeners have been compelled to find new channels to get their pop fix. It is still too early to conclude whether P7 Mix listeners have found new stations or whether they have switched to Spotify or similar streaming services.

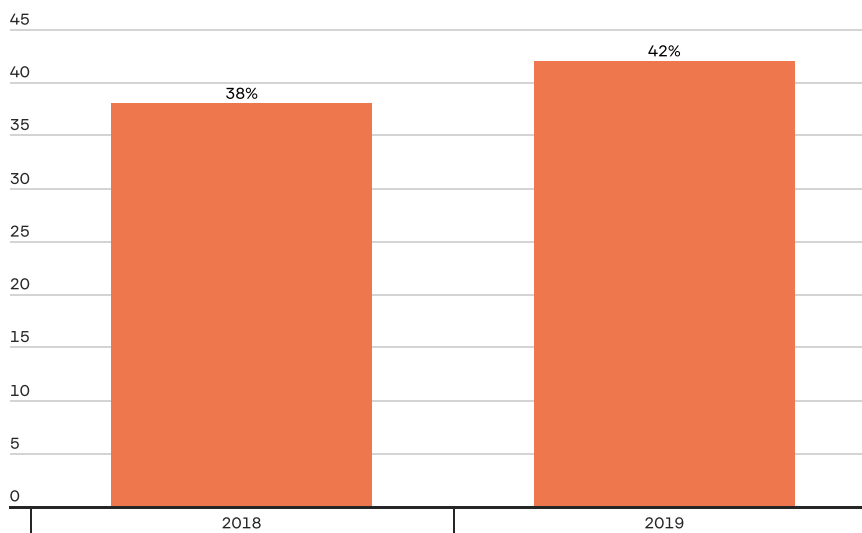
In 2019 there was quite a lot of noise about the allocation of a DAB frequency to Radio LOUD, which finally ended up in the decision that Radio24syv will not continue. At the time of writing, the detailed plans for the new channel's profile are not known, but one question may arise: Is there really room for up to three voice radio channels in the Danish market?

It is difficult to answer this question unambiguously, but the same concern was also expressed back in 2011, when P2 was to give its FM frequency to Radio24syv. Because was it not really a waste of resources to have two voice radio channels for the approx. 700,000 Danes, who listened to the voice radio back then?

It turned out to be an unfounded concern, as P1 and Radio24syv in 2019 succeeded in complementing each other in such a prestigious way that both channels had a record year measured in listeners. 790,000 listened to P1 and 557,000 listened to Radio24syv on a weekly basis. Overall, this meant that there were 1,067,000 weekly listeners to the voice radio in 2019 up until November 1, where Radio24syv closed - as much as 44% more than in 2011. The decisive factor is whether the channels' profiles complement or overlap each other. It is still too early to draw a conclusion, but at least the description shows a big difference between Radio4's focus on local and regional public service from across the country to Radio LOUD's focus on young audiences and constructive journalism - and then P1's presence as the revitalised public service beacon.

One of the things, on which Radio LOUD's success will depend, is the DAB listening, as this channel is the only voice radio that does not have access to an FM frequency. In 2019, 36% of the population listened to DAB weekly.

### Share of digital listening on DR's radio channels

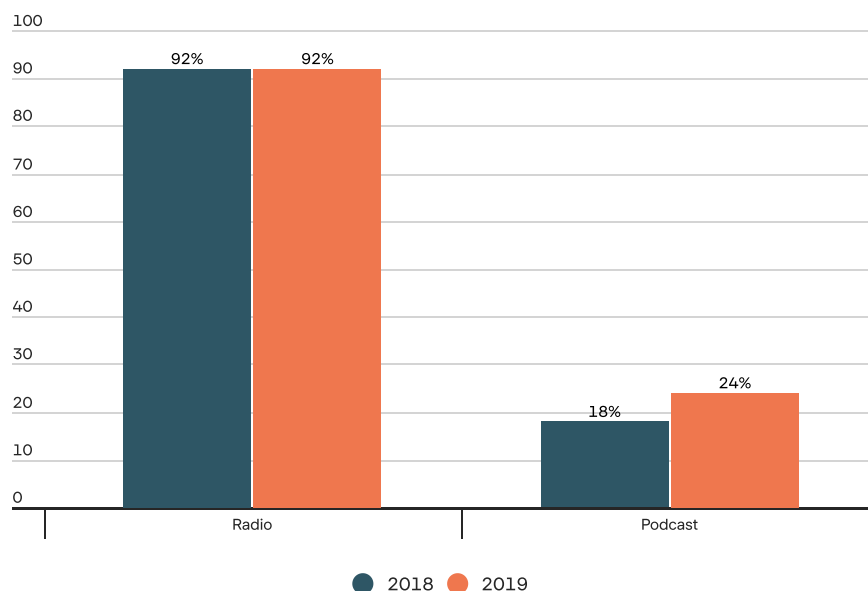


Target group: 12+ years, Period: 2018-2019, Source: Kantar Radio Meter, Digital listening: DAB, web and cable

### New insights in podcast Denmark

Another way of accessing radio content that more and more people discover, is the podcasts. In 2019, 24% of the Danes listened to podcasts weekly - the highest level measured so far. Previously it has been difficult to form an overview of which podcasts the Danes listened to. Because although studies could reveal the publisher-level figures, the industry was missing a common programme-level overview. Such an overview saw the light of day in 2019 on [podcastindex.dk](http://podcastindex.dk), which allows everyone to keep up with the podcast market.

## Weekly users of radio and podcast



Target group: 12+ years, Source: Kantar Radio-Meter & Kantar Local Radio Index 2nd + 3rd quarter 2019

It is clear that DR's dominance in the traditional radio listening is not nearly as pronounced when it comes to podcasts. Even though Mads & Monopolet is quite consistently the most downloaded and streamed podcast on the list, the next places in 2019 are taken by titles such as Mørkeland, Den korte radioavis and Det, vi taler om. Another point is that the Danes, like many others in the podcasting world, love the true crime genre. Podcasts based on criminal cases from the real world obviously fascinate many people.

### All quiet on the Internet

While 2019 has been a tumultuous year with major changes in both TV and radio, the Danish online industry has been characterised by relative stability. The Danish news media's websites have not seen any significant closures or openings in 2019, and although there are always shifts in a market, the basic conclusion is that the market is the same as ever.

Likewise, it must be said that the Danes' use of social media did not undergo major transformations in 2019. Last year, the proportion of Danes on Facebook was steadily high, but there was a decrease in the proportion of people, who were on Facebook daily - and the trend was particularly pronounced among young people, which is why you could be led to believe that a period could now be expected, where Facebook might feel the pressure from the user numbers. This proved to be incorrect. After seeing a major decline in 2018, the Danes' use of Facebook has now stabilised.

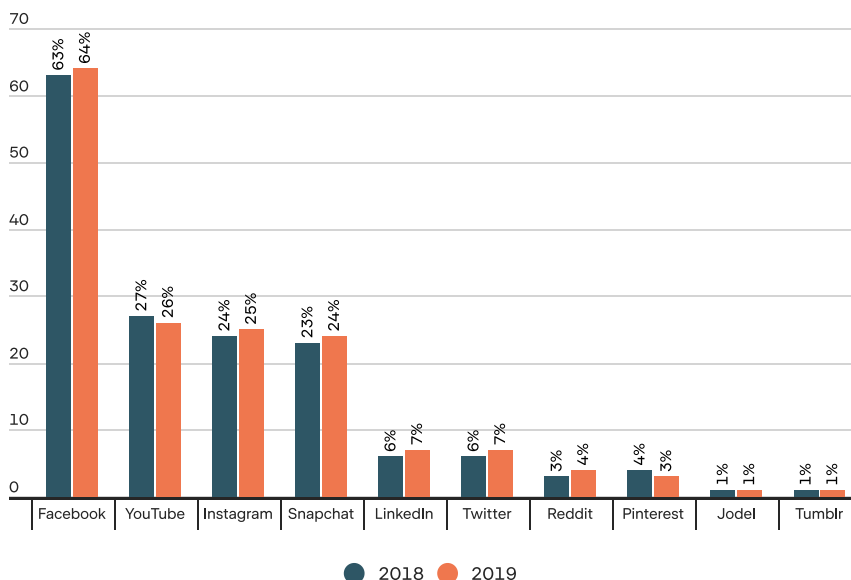
“  
*The proportion of Danes, who use social media daily, is still high at 78% and has not fallen in recent years.*

DENNIS CHRISTENSEN & HENRIK GREGOR KNUDSEN,  
DR AUDIENCE RESEARCH

Other services do also show stability or moderate growth. YouTube is decreasing slightly, while e.g. both Instagram and Snapchat in 2019 saw a growth in the number of daily users. TikTok is quite small with 1% of the population as daily users, but among the 9- to 14-year-olds the figure is 20%.

The proportion of Danes, who use social media daily, is still high at 78% and has not fallen in recent years. So there is nothing to suggest that the Danes have got less taste for using social media. It is just the consumption that moves a little from year to year.

## Share that daily uses social media



Target group: 12+ years, Period: 2018-2019, Source: Kantar Social Media Life

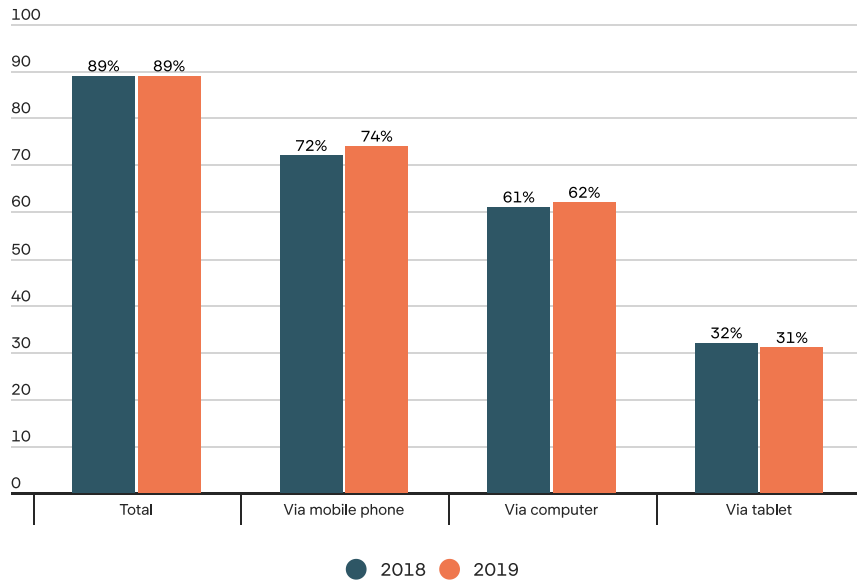
## Privacy and Internet

Major topics on the agenda in 2019 were the users' privacy, data collection and the like. On top of the GDPR introduction in 2018 and the previously introduced cookie directive, the Danes have gradually become accustomed to the fact that all visits to websites must start by clicking away boxes regarding cookie and data consent. Only few Danes actually treat cookies as anything other than just another box that needs to be clicked away so that you can move on.

In general, several of the major technology giants have actively engaged in the security and privacy of their users and customers. For example, Apple has built in a very fascinating (and frightening) screen time feature in their operating systems, which in detail snitch on how much you use your phone, how often you open it and how many notifications you receive. All with the purpose of helping the user to develop healthy habits in terms of using his device with care. After all, it is a change from the times where companies almost proudly told how they "enticed" users to spend just a little extra time in the company of the product. Now the picture is almost inverted.

Several of the big tech companies now market themselves on being concerned about the users' screen time and privacy. As for the latter, Apple has in their app store targeting kids tried to ban the measurement of the use of apps, and both Google's Chrome browser and Apple's Safari are battling to be the best at deleting the users' tracks on the web, in an attempt to reduce the feeling one has had of being monitored on the Internet. In addition, Instagram is testing if the like

## Share that daily/almost daily uses the Internet



Target group: 12+ years, Period: 2018-2019, Source: Kantar Index Denmark 1H

### Uncharted waters

2019 resulted in major decisions in the media field, of which part of the consequences will only become known during 2020. 2020 is likely to be a historic and stormy year for Danish media. A potential new media settlement will set the framework, while major changes will occur. Not just on the digital media front, but also in the traditional media, where both radio and TV channels are closing, while new channels and services are opening. What is certain for Danish media users is that 2020 will not be completely uninteresting.



2019

## Streaming toddlers

Toddler parents are primarily digital in their media usage. Therefore, it is often obvious to them to present the very youngest to streaming content, which is why children under the age of 3 are now extensively streaming video and television content.

BY [KATRINE GREEN](#), [SANNA HØGENHAVEN BYRRESEN](#) & [LENE HEISELBERG](#)

New and young parents are typically born in the late 1980s or early 1990s. During their development from child to adult, rapid technological development played a key role, and today technology and digital media are an integral part of their everyday lives. Streaming television and video content on YouTube, DRTV and other streaming services plays a substantial role in their media consumption, while their relationship to traditional TV is weaker than that of previous parent generations.

### 1 in 3 toddlers aged 0-2 stream DR content weekly



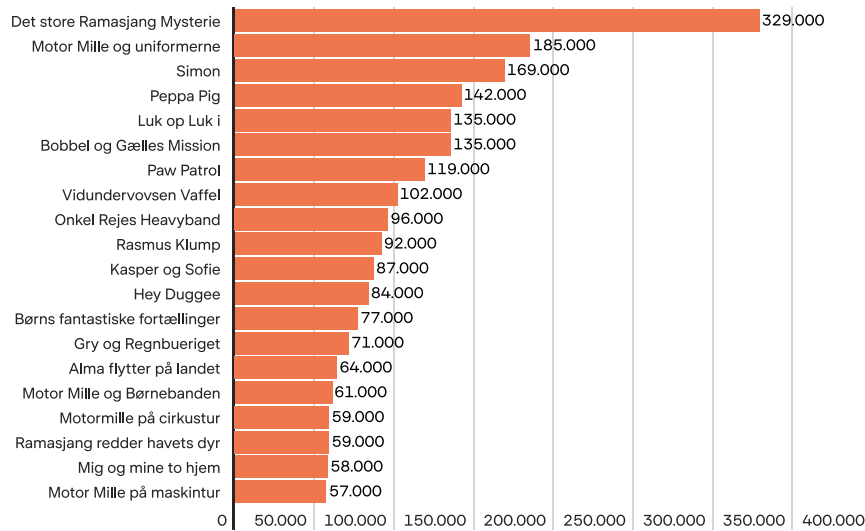
● Share that streams content from DR weekly

Target group: 0-2 years, Period: 2019, Source: Kantar 360-degree measurement for DR Interview survey where parents respond on behalf of the children.

The parents set the framework for the very youngest children's media and screen usage. About every third Danish child under the age of three weekly streams content from DR, while about half of them use YouTube. The parents also indicate that their children under the age of 3 watch content from e.g. Netflix and Viaplay. DR Audience Research sources also indicate that children under the age of 3 spend up to half an hour daily watching video and TV content from DR. The estimate includes both the consumption of traditional TV and streaming, and here the content from Ramasjang takes the lion's share.

Experience from Swedish public service provider of SVT shows that parents have different motives for exposing the very youngest to streaming content. Among other things, they wish to stimulate their children and to feel that they are doing something good for the children's development. Streaming content can also act as a pastime or a distraction in a busy day, for example, if the parents need peace to cook dinner or some much needed peace in the back seat of the car. In addition, streaming content may act as the framework for shared laughs and entertainment between children and parents.

## Most streamed programme series at Ramasjang in 2019



Target group: All, Period: 2019, Source: Adobe Analytics

The figures are on-demand viewership and include viewing on DRTV and on the Ramasjang app. The viewership is an average per episode in the series in question and all seasons are included. Number of episodes and availability periods vary. A co-watching factor of 1.7 is included. Individual films, trailers and music videos are excluded.

### Who are the toddlers?

Parents are central to children's media and screen usage, but in addition, it is also interesting how developed children under the age of 3 are - how they think and what they are interested in.

DR Audience Research has examined what children under the age of 3 are interested in. They have clear preferences, mind you, when asking their parents. Overall, both girls and boys under the age of 3 are interested in motor play, animals, creativity and construction. This is in line with what the youngest like to watch on YouTube, e.g. cartoons such as Peppa Pig and Curious George, videos with animals and animal sounds as well as creative videos with colours, shapes and children painting. Another great content area is children's songs and music.

If you take developmental psychology into consideration, there is a broad consensus that the youngest children are interested in human faces and voices and that they are social right from birth. Much of the content that the youngest like to watch on YouTube focuses on clear faces, voices and smiles. One of the recurring points of developmental psychology is that one should do everything one can to make the early experiences good because the child builds his new understandings on them. Therefore, positive reactions and feedback are the right way forward.



*Today, we know that the very youngest children stream video and television content extensively, and that places demands on both the industry and the parents.*

For children under the age of 3 to be able to understand the content, it must be easily recognisable, simple and slow. The youngest have difficulties in understanding the more complicated contexts, such as a happy ending after Shaun the Sheep has hurt himself. In this target group, it is serious business when the sheep hurts himself, because the child cognitively is unable to link a longer negative narrative to a happy ending.

### Screen time: A debated topic

Screen time and use is a much debated topic, and the guidelines in the field are not identical. The use and the potentially harmful effects are particularly debated when the target group is under 3 years old. The WHO's recommendations state that children under the age of 5 should at most watch the screen one hour a day, and that babies below 1 year of age should not watch the screen at all. However, according to Danish and foreign researchers in the field, there is no research evidence that children will fail to thrive if they use screens.

KATRINE GREEN, SANNA HØGENHAVEN BYRRESEN & LENE HEISELBERG, DR AUDIENCE RESEARCH



There has always been some concern about children's use of media, but in the media industry there has historically not been much focus on children under the age of 3. For example, the official Danish TV meter measurement only includes children after they have turned 3. Today, we know that the very youngest children stream video and television content extensively, and that places demands on both the industry and the parents. The parents in the small homes must set the framework for how much and not least what content the children are allowed to watch.

Streaming video and television content can complement other common activities between parents and the youngest children. Instead of parents sitting down with the child and reading a book aloud, they may watch some content together on a tablet. Just as in the choice of books and toys for the child, it is important in the choice of television and video content to take the child's developmental stage into account.

#### Læs videre

- WHO-rapport: [Guidelines on physical activity, sedentary behavior and sleep for children under 5 years of age](#)
- EU Science Hub: [Young Children \(0-8\) and Digital Technology - A qualitative study across Europe](#)

Cognitively, children under the age of 3 find it difficult to follow and understand complex narratives. Instead of focusing solely on the time spent, the focus should also be on what the children are exposed to.

#### ABOUT THE STUDY

Figures in the article originate from the Kantar 360-degree survey for DR, Adobe Analytics and the study of 1- to 8-year-olds' interests carried out by DMA Research for DR Audience Research. In addition, insights from developmental psychology and experiences from SVT regarding the development of Bolibompa Baby have been included.



2019

## The path through the streaming jungle

Until 1988, there was one TV channel in Denmark. Thus, at one point, there was one television programme that a DR editor had chosen to show you - in other words, curated content. Fast forward to today: now there are hundreds of TV channels and streaming services, and the path to the content is paved with a multitude of easy and difficult decisions to be made before the users can collapse with exhaustion on the couch. We have taken a closer look at the users' path to the content.

BY JAKOB VIKÆR HANSEN & MICHAEL OXFELDT

On November 1, a new streaming service saw the light of day as Apple TV+ announced its arrival in the Danish streaming market. In 2020, another plus will be added to the name of a well-known brand when Disney+ is launched in several European countries and soon also in Denmark with a massive list of franchises, superheroes and nostalgic characters. The supply of an already crammed streaming market is again increasing and the battle for the users' attention and money is intensifying. In a larger study, DR Audience Research has sought to uncover why we stream, our considerations behind our choice of services, and ultimately how we choose the content of the services. In other words, the path through the streaming jungle.



### Streaming freed of time and space

It may not come as the biggest surprise, but the most important reason for streaming is that you can see exactly the content you want exactly when it suits you. This contradiction to traditional TV's defined framework is crucial, whether you are young or old, high- or low-frequency streaming, and whether you prefer to use YouTube or DRTV. Once this universal need is met, the motives for streaming immediately scatter in many more different directions depending on age and digital behaviour. Roughly speaking, you can divide the streamers into two groups: The young streamers, who go for the services that have the coolest and funniest - and preferably free - content, and then the older users, who to a greater extent are going for services that allow them to capture the content they missed on TV.

*Danskerne streamer som aldrig før, og det vender i disse år op og ned på det etablerede tv-marked, og den måde vi tilgår vores indhold på.*

JAKOB VIKÆR HANSEN & MICHAEL OXFELDT,  
DR AUDIENCE RESEARCH

At the same time, the study also reveals some clear user requirements that come into play when choosing which streaming services to use your energy (and money) on. First and foremost, the streaming service should work. Technical problems, long load times and inadequate search features are clear showstoppers for the users. The service must also be user-friendly, and the content must be easy to find and access. If the experienced and discerning users find that

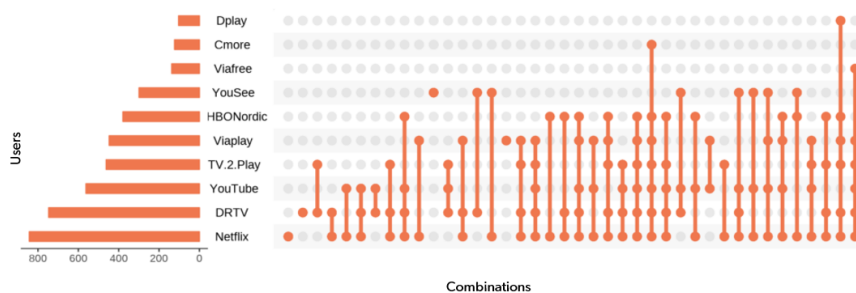
programmes do not start, apps stop or search features do not give them the expected results, they will quickly find alternatives.

In addition to functionality and user-friendliness, the users select and deselect services based on the width and depth of the content. We expect the price of a service to include very varying content and that the service gives us access to the whole tail of old seasons and previous episodes. For the same reason, the battle for the rights to beloved series such as Friends and The Simpsons, sports events such as the Premier League, and film franchises such as Star Wars is a huge business that can determine whether you as a user choose one service over another. Here, the emphasis is on the quality of the content of the individual services. Do they have my favourite series? Do they have rights to my team's matches? Do they have many horror films? The users are demanding content and services that give them individual value, something to laugh at and which also has a large list of films.

### A patchwork of services

In this country, 3 out of 4 have tried to stream, and more than half of the adult population streams weekly. There is nothing new about young users streaming more than the older ones, but the proportion of older users opting for streaming services is growing, while the proportion of Danes with access to a traditional TV signal is declining. The Danes use approximately just under three hours of watching TV and streaming daily, of which traditional TV accounts for a little more than two hours daily, while streaming amounts to about three quarters. In short: The Danes are streaming like never before, and at present this is turning the established TV market and the way we access our content upside down.

### Combination of streaming services among streamers



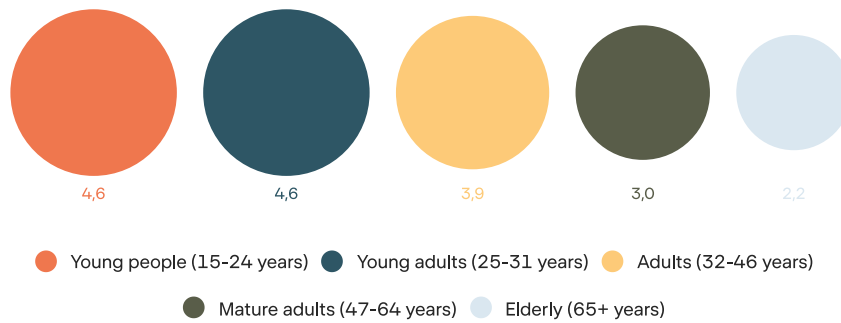
Target group: 15+ years, Period: 2019, Source: Norstat for DR Media Research  
Help text: The graph displays the ten most frequently used streaming services among streamers as well as the most frequent combinations among these ten services. The combination gets more frequent as it moves left. The combination between Netflix and no other service is the most frequent combination among the streamers in this dataset, the combination between DRTV and no other service is the second most frequent, the combination between DRTV and TV 2 Play is the third most frequent etc. The graph only displays the combinations that occur between the ten most frequent streaming services.

At the time of writing, the streaming market in this country is dominated by six services: Netflix, DRTV, YouTube, TV 2 Play, Viaplay and HBO Nordic. However, the streaming market can by no means be isolated to these services alone, as the market is most of all a patchwork of services that are selected and deselected for different reasons. Common denominators across generations are film, documentary and Danish content, while young people are more interested in entertainment, reality and American content than older generations. Therefore, the young people's favourite services are Netflix, YouTube, DRTV and Viaplay, which each in their way fulfil the need to be able to reflect in other young people or to lean back and be entertained.

### No one stop shop

While older streamers settle for one or maybe two services, young users on average shop from four and five services. Thus, the fewest users have a one stop shop where they can get everything in one place. Because Netflix does not have any news and only a limited amount of Danish content, and conversely DRTV is not rich in movies. None of the services have Premier League rights, which, in turn, Viaplay has, and you can go on like that. Therefore, young users continue to choose precisely the three, four or five services that best serve their needs and suit their purse. And it is exactly the user requirements that are key: For when the services are chosen and maybe paid, what motives are found behind the choices made on a regular evening?

## Number of streaming services used among streamers



Period: 2019, Source: Norstat for DR Media Research

### Content is king – but the context sets the frame

Although the study indicates that the users to a great extent plan in advance what they want to see, only few people wake up in the morning with a firm determination to binge three episodes of *Watchmen* on HBO Nordic in the evening.

Generally seen, the users navigation in the streaming content is based on four parameters: Context, time, visibility and technology.

The context covers many different decisions: What mood are you in, are you alone or with others, can you veg out in front of a large screen, or are you using your smartphone for viewing? There is a big difference between choosing content that should fit in a context where you do not have your full attention directed to the screen, such as in the kitchen during cooking, where a few episodes of *MasterChef* on Viaplay fit well into both the mood, one seeks - but also the concentration you can muster while juggling pots and pans yourself. Conversely, we choose a completely different type of content for later in the evening, where you can focus more on understanding the intricate details of *The Laundromat*, the money laundering scandal, or revel in the magnificent pictures and the large gallery of characters in *The Crown*.

When also time becomes a factor in the choice of streaming content, it is both a matter of what time of day it is, but also of the time we have available. In the early evening hours, as streamers, we are much more likely to choose content that lasts more than an hour, while formats typically get shorter and shorter as the evening progresses. This is a bit contrary to the behaviour you typically see in a flow world, where the evening is typically rounded off with a 90-minute crime story; the active option means that as a streamer you are more likely to choose shorter content - and maybe even something you have seen several times before.

### Technology and visibility - two sides of the same coin

The last two parameters: content visibility and technological support are at the same time dependent variables and each other's contradictions. Our mental records are already well stocked, and we may have forgotten that we embarked on a new series last Wednesday - even though in the moment it was actually super exciting. With all the content available across the streaming services, it is crucial that the content is visible and easily accessible, and since we rarely have the patience to scroll far down the page, the attractive top banners are in great demand. However, we do not navigate solely on whether our favourite series has a prominent placement or whether you have the opportunity to add it to your favourites. Also, social visibility is crucial to our path to the content, and it can make a big difference to our choices if we feel excluded from participating in the chat at the coffee machine if we have not watched the series everyone is talking about right now.

#### What is streaming?

Television is no longer just called television. Streaming, flow, live, on demand, casting, binge... Get your vocabulary updated in the new TV and streaming era [here](#).

Where the visibility of the content is very tangible in terms of placement, publicity and marketing, the technological support of our choices such as personalisation and recommendation algorithms is more subtle. Whether the streaming service bases its recommendations on the demographic information provided when creating your personal login, or whether the personalisation is based on the registration of a cookie-based behaviour (or a combination of both), the very recommendation of content to users is part of supporting an additional consumption of the same kind of content. But it also helps promote content that the user might not have chosen himself. Regardless of strategy, this behaviour-driven marketing is an important part of creating visibility around all the content, which the users want - but which they may not even know exists.

### **The path to the content is complex**

As such, there is no clear hierarchy in the four parameters, just as they all influence each other. And this helps to emphasise the complexity that comes with the streaming reality. The context or the need rarely stands alone without also taking the time available into consideration. It may well be that the super-ego pushes for not being the last to see *Game of Thrones*, or for actually seeing *Leaving Neverland* since everyone is talking about it. But as the time approaches 10 p.m., and as tomorrow is a workday, it just seems like a more obvious decision to spend the last hour before bedtime - maybe even already with your toothbrush in your mouth - in the company of Chandler, Monica, Joey and the other friends, unless you go completely into snack-size mode and nerd with a string of short YouTube videos about sharks and moon landings. In other words, it is crucial for us as users in our faithless search for something to watch that the streaming service providers not only have the latest titles or the best backlist, but also that their focus on technical features and targeted communication supports our path through the streaming jungle.

#### **ABOUT THE STUDY**

The study is a quantitative survey of the users' knowledge and use of streaming services linked to a qualitative study of the streamers' behaviour and usage motives. In September 2019, in collaboration with Norstat, 1,028 questionnaire interviews were conducted, while the qualitative analysis is based on 165 streamers who, over three weeks in November 2019, have documented their television and streaming behaviour in a number of diary surveys.

*The article also includes figures from the Kantar Establishment Survey, 2nd quarter 2019.*

2019

## A new generation's music discovery

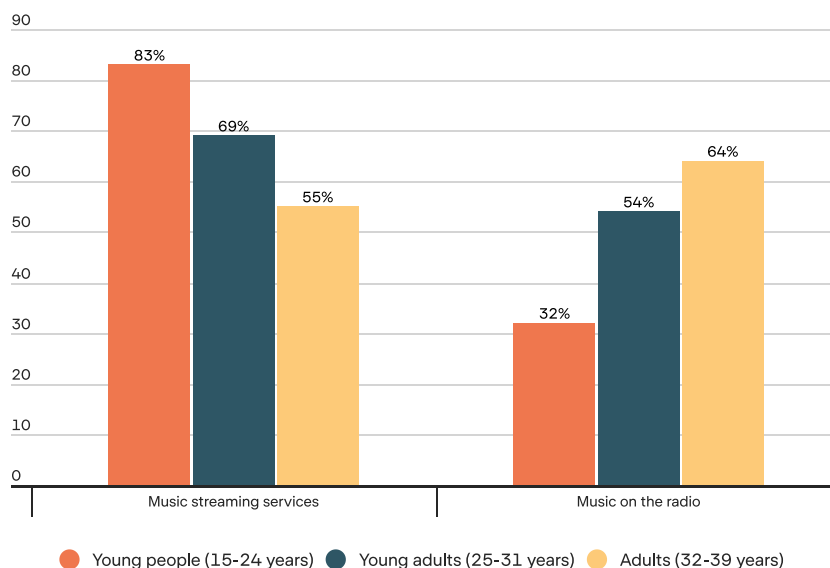
In 2019, music and radio are the content that the Danes spend most time on on their mobile phones. Especially for young people between the ages of 15 and 24, music is an essential part of their media use and in their circles of friends. But how do they consume music and sound, how do they discover new music - and what does it mean for the use of sound now and in the future?

BY PETER NIEGEL & RASMUS KIDDE

The music industry has undergone major upheavals during the past 20 years. The proliferation of smartphones and music streaming services in particular has made music ubiquitous. As shown in last year's [Media Research](#), not only music but sound in general is more hot now than it has been for many years. On this basis, DR Audience Research has conducted a study of young people's music usage to understand what this development means for this generation's use of sound, music and radio.

The study indicates that there are major differences in the music usage of Danes under and over 25 years of age. Music users over the age of 25 listen to music in the same way they always did, but of course they have replaced the physical CDs with streaming. However, for users under the age of 25, the story is a completely different one. It is this group's significant shift in music usage that we have gained a better understanding of and which we are explaining here.

### This is how the young Danes listen to music and radio

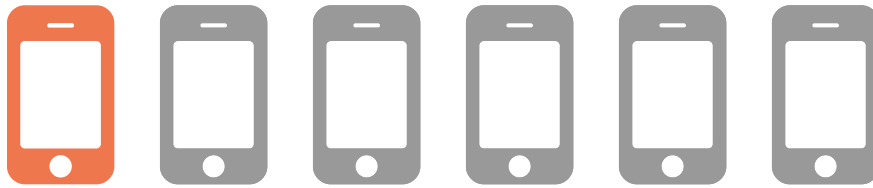




## Convenience beats sound quality

First and foremost, convenience or user-friendliness drives young people's music consumption. This is not new, because it has almost always been like that. Thus, sound quality does not mean much to the music experience, and it is more important that the music is at hand at all times than the sound coming from high quality speakers. Today, music is an integral part of the smartphone, which is largely the only focal point of the consumption of music in the young target group. The music is consumed through headphones as accompaniment to today's chores across time, space and situations. Spotify is almost exclusively the music provider for young people under 25. Last century's large speakers in the teenage rooms are ancient history, and, in other words, sound quality must give way to convenience. And the trend is ultimately made clear by the fact that almost every fifth actually states that they listen to music daily via the small built-in speakers of the smartphone.

## 1 in 6 young people listen to music daily via the built-in speakers in the mobile phone



Target group: 15-24 years, Period: 2019, Source: Norstat for DR Audience Research

Another aspect of convenience is the death of the album. Playlists built around moods and genres now make up the vast majority of young people's listening to music. The playlists have had the result that music consumption today is one large pick-and-mix sweet shop. Now you get exactly the songs you like, put together as you want it, for your exact mood and situation, for whatever length of time you want. In other words, the album's technical limitations in, among other things, duration and playback have been removed in the user's pursuit of a situational mood.



*The search in the dusty backrooms of the music shops for a 10-year-old album is in the past and has now been replaced by a single tap on Spotify.*

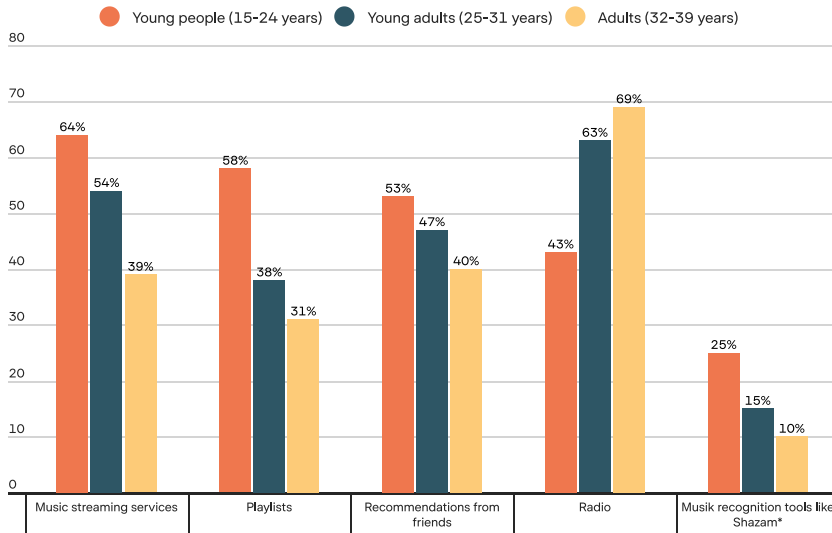
PETER NIEGEL & RASMUS KIDDE,  
DR AUDIENCE RESEARCH

## Music discovery takes place everywhere

Also in the discovery of new music, young people have changed their habits. Where radio was previously the dominant source of music discovery, playlists of streaming services and recommendations from friends are now clearly the biggest paths for music discovery in this target group. In addition, music recognition tools such as Shazam have fragmented the music discovery. Music discovery is no longer linked to either a particular place or a specific time, but it now takes place everywhere: TV series, gaming, Spotify, recommendations, playlists, radio, commercials, social media, YouTube and many other platforms and locations are all potential sources for discovering a new favourite song.

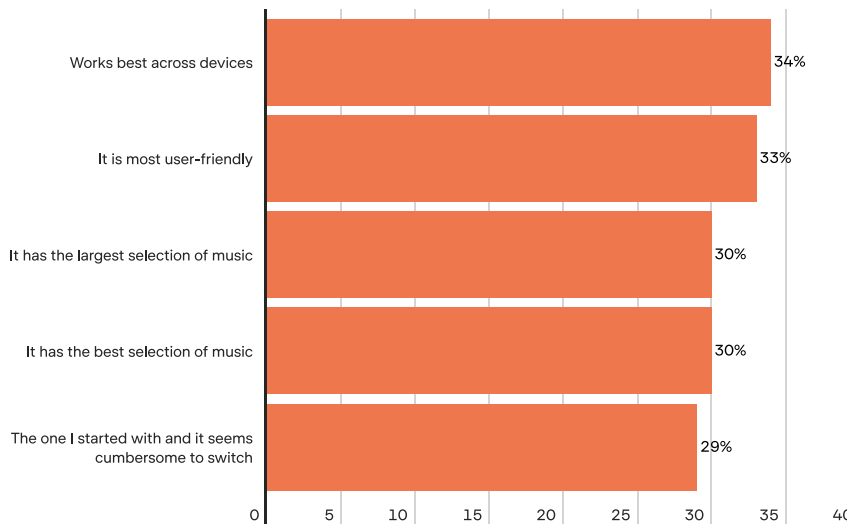
Another insight is that the youth audience does not define new music from the release date, but from what is new to them. This may always have been the case, but with the advent of music streaming services, the path to new music is the same whether the song was released last week or in 1982. The search in the dusty backrooms of the music shops for a 10-year-old album is in the past and has now been replaced by a single tap on Spotify.

## How do young people discover new music?



Period: 2019, Source: Norstat for DR Media Research

## The five main reasons for choosing a music streaming service



Target group: 15-39 years, Period: 2019, Source: Norstat for DR Media Research

## Music now and in the future

Music has always been, is now and will continue to be one of the most important content areas for young people. Both as identity bearer for the individual and as cohesiveness in the group of friends. Whether you are the long-haired rockerboy in the class, the disco queen in the breaks or the best rapper in the schoolyard, music has the ability to tell who you are and what community you are - and definitely are not - part of.

But how will music consumption develop in the future? Firstly, convenience will continue to be what drives music consumption forward and defines the media platforms we use. The mobile phone that we bring along everywhere. The smart speaker that via a single voice command plays your favourite music. Shazam that recognises the song in the film. Wireless headphones that you can carry anywhere. These are merely examples of the technical solutions that we know in 2020 - and more will come.

Secondly, personalisation will continue to control the music consumption in the streaming services. Their algorithms help you discover the "new" music you didn't know you loved. The freedom of choice of the services gives you total control of your music consumption at the same monthly price as the previously cost of one CD. And in personalisation also lies that the playlists, which you have carefully cre-

ated over a long time for your specific needs and mood, are actually incredibly personal. These playlists will retain you to the streaming service as nowhere else you can find the music that reflects precisely your needs at any given time. For the same reason, it is an open question whether or not the personalisation of the streaming services is exactly the functionality that will ultimately have the result that young people under 25 will not log out of the streaming services as they get older.

#### THE STUDY

The figures in the article are from the survey Unge og Musik – Brug, kuratering og opdagelse (Young people and Music - Use, Curation and Discovery) that Norstat conducted for DR Audience Research in 2019.

2019

## The past media year

2019 featured parliamentary elections, TV feud as well as new channels and streaming services in both television and radio. DR Audience Research has selected a number of large and small events as well as some of the figures and trends that have marked the media year – ranging from what we talked with each other about during our lunch break to who will characterise the media development in the coming years.

BY DR AUDIENCE RESEARCH

- 
- **JANUARY 4:** A picture of an egg is posted on the Instagram account @world\_record\_egg, and just a week and a half later, the picture surpasses Kylie Jenner's record posting with 18 million likes at that time. At the time of writing, the egg has 54 million likes.
  - **JANUARY 8:** Two new TV channels are seeing the light of day as Xee and Paramount Network enter the market. The two channels together account for approx. 1% of the Danes' time spend on TV in 2019.
  - **FEBRUARY 4:** YouTube Kids is launched in Denmark. According to YouTube, the platform makes it "easier and safer for children to experience the world through videos". Approx. every other child under the age of 3 uses YouTube during a week.
  - **FEBRUARY 18:** Vice, the underground media, which addresses a younger target group and which, among other things, publishes Noisey, Munchies and Broadly, closes down in Denmark after cuts in the company's international branch.
  - **MARCH 13:** Ghita Nørby is interviewed by Iben Maria Zeuthen for a documentary on Radio24syv. They had a bad start in what may be characterised as the most talked about interview of the year. According to Radio24syv, 400,000 people listen.
  - **MARCH 20:** The Indian YouTube channel T-Series overtakes PewDiePie as the most popular YouTube channel, and currently has 121 million subscribers. Every other Dane uses YouTube weekly.
  - **APRIL 2:** The social media Google+ throws the towel after having discovered a data leak. According to Kantar, at the end of 2018, 14% of the Danes used Google+ weekly.

- **APRIL 15:** The eighth and final season of Game of Thrones premieres on HBO Nordic. In the first half of 2019, 15% of the Danes stream HBO Nordic weekly.
- **MAY 1:** After some tumultuous years with, among other things, The Cambridge Analytica scandal, Facebook announces that focus on privacy will be greater in the future. Approx. 2 in 3 Danes use Facebook daily.
- **MAY 7:** Lars Løkke calls a general election to be held on Constitution Day, on June 5. The media is buzzing with stories, and the Danes are looking for election content across platforms. On DRTV, in particular the Partilederrunden, Debatten and Aftenshowet are streamed in the days up to the election.
- **JUNE 3:** Podcastindex.dk is launched. For the first time, there is a total measurement of programme-level podcasts in Denmark. Mads & Monopolet, Mørkeland and Den korte radioavis are some of the most listened to podcasts of 2019.
- **JUNE 5:** The Danes go to the parliamentary elections. DR's Candidate Test is taken 2.4 million times up to the election, and 300,000 take the test on the day itself.
- **JULY 4:** Season 3 of Stranger Things premiered on Netflix, and according to the U.S. streaming service it beats all records. According to Netflix, 41 million users watch episode 1 during the first four days - and 18 million users watch all season episodes during the same period.
- **JULY 11:** A statement based on the Gallup Lokalradio Index shows that there are now more Danes, who have tried to listen to a podcast than Danes, who have not. In 2019, 24% of the Danes are on a weekly basis listening to podcasts, which is the highest level measured.
- **AUGUST 14:** NENT, Discovery Networks and TV 2 find common ground to better document the value of digital advertising. In the first half of 2019, the streaming services of the three media houses, Viaplay, Dplay and TV 2 Play, are used weekly by 15%, 3% and 15% of the Danes, respectively.
- **AUGUST 26:** Berlingske Media drops the daily edition of B.T., the single-copy sales newspaper, which in the future can only be purchased in single-copy sales during the weekend. In 2018, the newspaper got a new newspaper brand in B.T. Metro, when Berlingske merged with Tamedia, who owned MetroXpress.
- **SEPTEMBER 17:** The Podimo podcast media goes live. During the first half of 2019, 24% of the Danes listened to podcasts weekly - and increase from 17% from the first half of 2018. The growth is, among other things, created because large services now integrate podcasts as the content emerges.
- **SEPTEMBER 22:** F.R.I.E.N.D.S, or Friends, turns 25. Since the premiere, the series has been aired for approx. 6,200 hours on Danish TV channels. The 236 episodes have been broadcast about 58 times each, and the Danes have spent an average of 73 hours watching Friends on TV. Added to that should be DVD, Netflix and others.
- **OCTOBER 3:** As part of DR's new strategy, it will be a success goal for DR in the future that users feel that the content gives them value. DR measures on four parameters: Satisfaction, relevance, quality and worth the time. In the third quarter of 2019, 68% of the Danes experience value from their use of DR's offers.

- **OCTOBER 31:** Radio24syv broadcasts for the last time before the FM4 band is assigned to Radio4. Shortly before, they lose the tender for a new DAB channel to Radio LOUD that broadcasts from April 1, 2020. In 2019, Radio24syv had 557,000 weekly listeners, which also ended up as the highest level in the channel's lifetime.
- **NOVEMBER 14:** Instagram tests private likes on a wide variety of profiles. Instagram announces that if you are included in the test, you will no longer be able to see the total number of likes or views of photos. In 2019, 1 in 4 Danes is on Instagram daily.
- **NOVEMBER 19:** Google is launching the gaming service Stadia in Denmark. Stadia is their suggestion for a streaming service for computer gaming. 1 in 4 Danes plays computer games or game console weekly.
- **DECEMBER 18:** After YouSee announced on September 17 that Discovery Network's TV channels will not be part of YouSee's standard packages in the new year, the attempt to reach an agreement ends without reconciliation. In 2019, YouSee customers' use of Discovery's TV channels accounts for 5% of the total TV consumption in the Danish market.
- **DECEMBER 31:** DR K and P7 Mix shuts down at the end of the year, while DR3 and DR Ultra will move from flow to the DRTV streaming service. In 2019, the three TV channels combined had a weekly coverage of 2.2 million viewers on traditional television, while the P7 Mix had a weekly coverage of 470,000 listeners.





2019

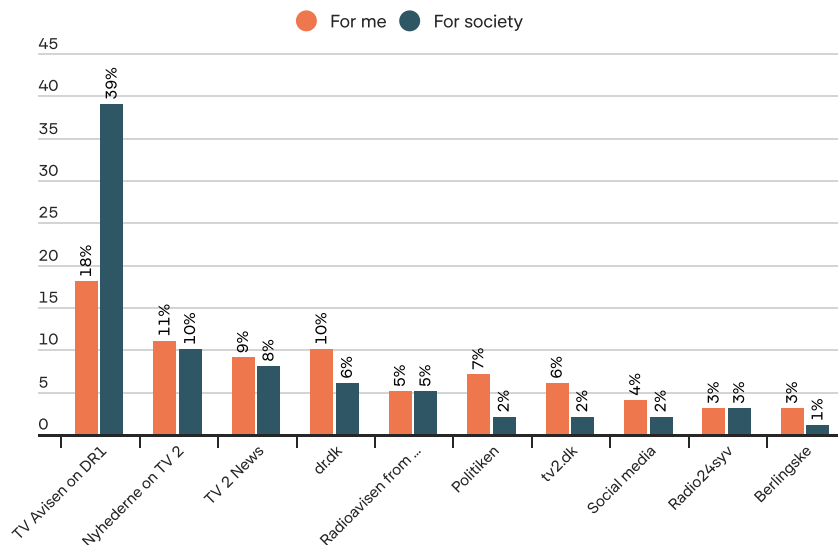
## Breaking news: The Danes still watch TV news

Although television consumption is declining and the smartphone is the primary source of news for many people, the TV news remains a cornerstone of many Danes' news usage. Even among those, who have reduced their viewing of the TV stations' regular news broadcasts the most, perceive TV news as important. The reason for this is that TV news has a series of totally unique qualities.

BY HENRIK GREGOR KNUDSEN

In general, news is not hit nearly as hard by the Danes' move from traditional television to streaming as for example fiction, reality and lifestyle. The reason is that the regular news broadcasts continue to be popular among the elderly, who have made the smallest cut in their traditional television consumption, but also that most people still prefer to watch a news broadcast live on television rather than on demand after the broadcast is produced and thus perhaps already obsolete. In addition, none of the foreign streaming services produce news, so it is difficult to get around DR1 and TV 2 if you want to be updated on what is happening in Denmark.

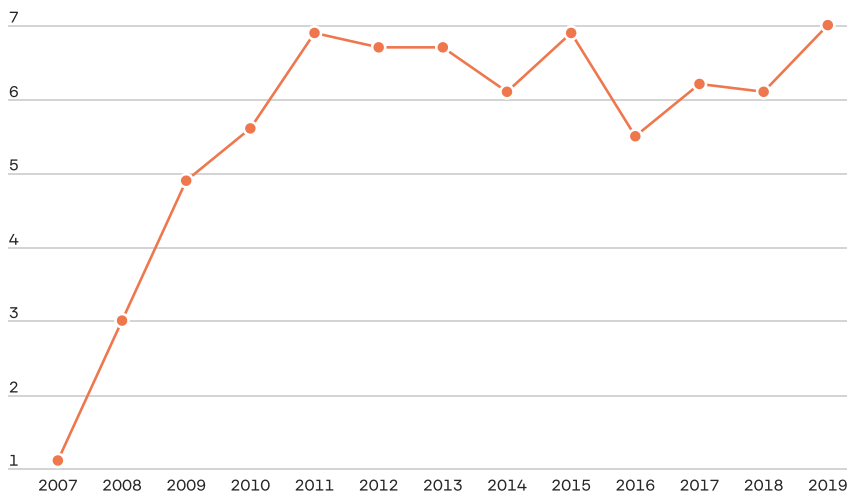
### Which of the following Danish news media is most important...



Target group: 15+ years, Period: 2019, Source: Megafon for DR Media Research

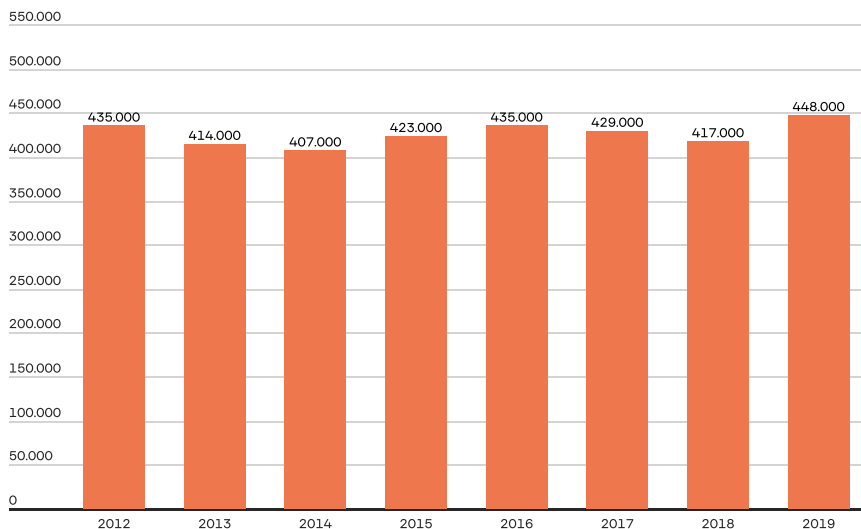
56% of the Danes daily receive news via TV. The figure has been slightly declining in recent years, but television remains the second largest news media, and has been surpassed only by digital news services such as news sites and apps, which are used daily by 66% of the Danes. Despite a one-third decrease in TV viewing since 2012, the consumption of television news is in some cases stable or even rising. This applies, for example, to the TV Avisen at 6:30 p.m. on DR1 and Deadline on DR2, while TV 2 News in 2019 ended up with a record high time consumption.

### Daily time consumption per Dane on TV 2 News (minutes)



Target group: 3+ år, Source: The Kantar Viewer Study, Data: Live + VOSDAL

### Viewership for TV Avisen at 6:30 p.m. on DR1



Target group: 3+ years, Source: The Kantar Viewer Study, Data: Live + VOSDAL

### The elderly have always watched a lot of TV news

While television continues to be a major source of news for the general public, there are, of course, variations when delving into the different life stages. However, this is nothing new, because the elderly have always watched more television and been more interested in news than younger people, who only really start to take an interest in tax rates and staffing in the country's day nurseries when age dictates it.

Where only every fifth of 15- to 24-year-olds receive daily news via television, this applies for almost all of the population, who has turned 65. Among young people, social media is by far the largest news source, and 52% of young people receive news daily on e.g. Facebook. This is not necessarily due to the fact that young people think that news on social media is any better than other kinds of news, but rather that young people already spend a lot of time on social media and thus inevitably get exposed to news.



*Websites, apps and social media therefore account for a very large part of the Danes' news consumption, and consequently it is striking that television is still considered to be of enormous importance.*

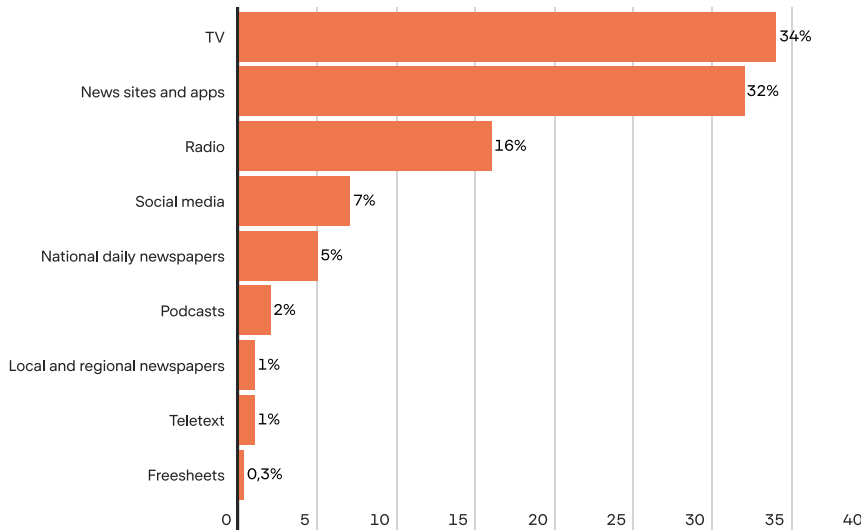
HENRIK GREGOR KNUDSEN, DR AUDIENCE RESEARCH

But social media is also a major source of news among the other life stages, which is hardly surprising in a country where almost two in three are on Facebook daily. Among the entire population, two out of five get the news daily via social media, and even among the very oldest, more than one in four come across news when they log on to e.g. Facebook or Twitter. Websites, apps and social media therefore account for a very large part of the Danes' news consumption, and consequently it is striking that television is still considered to be of enormous importance.

**TV is gold, the web is silver**

Although more people daily receive news via websites and apps than via television, the two media are experienced equally important when the Danes are asked which news media they would find most difficult to do without. In fact,

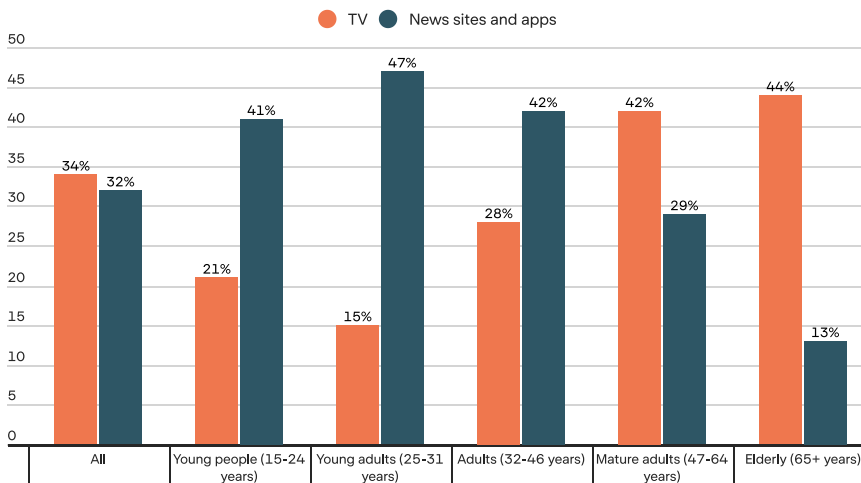
**Which of the following media would you find most difficult to do without as a news media?**



Target group: 15+ years, Period: 2019, Source: Megafon for DR Media Research

the Danes would find it a little harder to do without television than news sites and apps. Similar to the usage figures, the perceived importance increases with age, but even among the younger life stages, television is still of relatively high importance. Thus, 28% of 32-to 46-year-olds respond that television is the news source they would find most difficult to do without, compared to 44% of the elderly over 65. The special status of the TV media becomes even clearer when the population is

**Which of the following media would you find most difficult to do without as a news media?**



Target group: 15+ years, Period: 2019, Source: Megafon for DR Media Research

asked to state the Danish news media that is most important for society. Here, 39% say TV Avisen, followed by Nyhederne on TV 2 and TV 2 News. Only in the fourth place you find a digital news service in the form of dr.dk, and even if you put all the digital news services together, it is not enough to emulate the television news as the most important news media for society.

### Television cleans up the news stream

When television news continues to be important despite declining viewership, the reason is probably that it is roughly equal to DR and TV 2. The dissemination of news via television is, so to speak, institutionalised as opposed to the Internet, which is a patchwork of all kinds of more or less obscure news from a number of more or less well-known broadcasters. Therefore, many people almost feel that they have done their civic duty by watching TV Avisen or Nyhederne, while the benefits from an often flickering look at the web headlines are more doubtful.

For some, the amenity value of television news has even increased as they are bombarded with more and more push messages, yellow bars and enticing headlines on the web. Several of the surveyed point to the ability of television news to provide an edited overview of the news stream. If you have missed something important on the web during the day, you can be sure to encounter it in the news broadcasts on television. At the same time, many people find that on the web they only read about the topics that already interest them, while when watching the TV news they feel that they are also presented with topics, which they did not know could be interesting, or topics they feel they should know about.

### TV can do something special

While the consumption of television news on traditional TV is not as hard hit as one might expect, there still remains a task for DR and TV 2 in finding a streaming-friendly counterpart to the regular news broadcasts. Although more and more elderly have started to stream and young people's interest in news in fact increases as they get older, it hardly means that out of the blue they turn on the TV Avisen on DR1 as soon as they get a pension savings and a mortgage. Today, still only few choose to stream the news broadcasts in their traditional format.

The TV media continues to have a very special magnetism. Watching live pictures of reality - whether it is Puk Damsgaard reporting from a war zone or a crestfallen politician, who has lost his seat in the Danish parliament - is still something quite different from reading about it on the web. Media development is unlikely to put an end to television news, but major news stations need to work on reinventing themselves in a reality where more and more people are streaming their TV content. Will TV news find a format that makes it more streaming-friendly, or will web news slowly gain more popularity?

#### Read on

[Report from the Slots- og Kulturstyrelsen \(Palace and Culture Agency\)](#)

#### ABOUT THE STUDY

The figures in the article originate from a study conducted by Megaphone for DR, as well as figures from the Kantar Viewer Study.



2019

## Value in a new media reality

Once you've read this article, we already know a lot about you. Where you came from, how long time you spent reading the article and where you clicked when you were done. In turn, we don't know if you got anything out of the article. Was it worth the time, did it make you think and feel something, or did you perhaps talk to others about what you have read? The way the media industry measures user behaviour and engagement is undergoing a major change these years, and it is vital to the way you consume media content in the years to come.

BY MICHAEL OXFELDT, JULIE SCHWARTZ & DENNIS CHRISTENSEN

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When many of us sat down on the couch in the early 90s and watched Beverly Hills 90210, the new American youth television series, TV 2 was the next day able to measure the success in the number of viewers, who had been watching in front of the TV screens during the 45 minutes the program aired. The TV viewing of the population was quite stable, and having many viewers was by the industry regarded as an expression of good content, which many found attractive. These many viewers could be "sold" on to advertisers, as viewership was an excellent currency for the value of the commercial breaks between the television programmes. At the time, TV 2 was not a pay channel, which is why we as viewers only had to pay for the TV content with our presence. The system was as simple as it was brilliant. We received some content, for which we did not (directly) pay, while the advertisers were getting the attention of a nation, and TV 2 and the other tv stations and distributors were paid to mediate the contact between viewers and advertisers.

The reason why the system worked was that until the beginning of the 10s the number of media consumed in a reasonably uniform way was relatively manageable. You sat on the couch and turned on the television when the programme that you wanted to watch was aired. It was easy to measure the size of both programmes, channels and TV stations, and the focus was on producing content that could attract many viewers and thus higher revenue. As you know, quantity does not always equal quality, but when so many were still watching week after week, it had to be an indication that some Danes found the intrigues at West Beverly High worth their time.

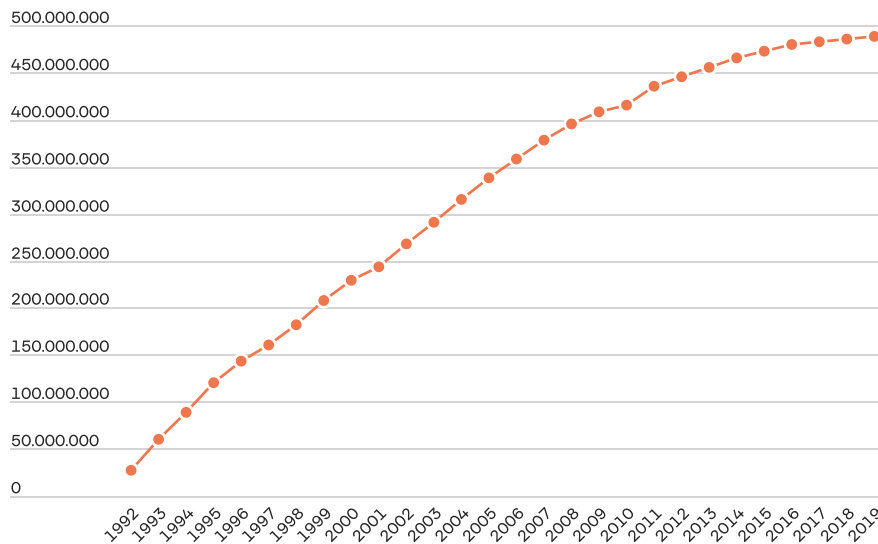
### The change in media habits

If we want to see Beverly Hills 90210 today, there are far more opportunities than there were in the 90s. In addition to the box set and re-broadcasts on the TV stations, it is now also possible to stream the series on the services that have the many seasons available. The modern media user thus has more opportunities to watch or watch again how the friends support Donna, who is just about to be thrown out of school, than we had a few decades ago.



Precisely this fragmented approach to the content also means that indicating the viewership becomes more complicated. Because today, the viewing of the single episode of Beverly Hills 90210 is not only linked to the time when TV 2 broadcasts the episode, but instead to when the individual user chooses to stream the episode from a given service. This simply means that today's viewership is not the same as tomorrow's viewership. At the same time, the series is available on multiple services, making it even more complicated to form an overall viewership.

### Accumulated number of hours spent watching Beverly Hills 90210 on TV 2 and TV 2 ZULU



Target group: 3+ years, Source: The Kantar Viewer Study, Data: Live + VOSDAL

In addition, today there is also a significant difference between viewers' motivation for watching content at all - especially when it comes to streaming. When the viewing becomes an active option, it also means more attention to what is happening on the screen. In this way, we are also beginning to make greater demands on those, who make the content available to us.

*The media market today is significantly more complex than the media market yesterday, because the new has not yet replaced the old, and business models and media offerings appear and complement each other...*

MICHAEL OXFELDT, JULIE SCHWARTZ & DENNIS CHRISTENSEN, DR AUDIENCE RESEARCH



Ultimately, today it is about whether you pay for the content with your money or with your mere presence. Because when you pay with your attention by watching advertisements, viewership is important because it documents a value to the advertisers. On the other hand, if you pay for content by subscribing to an ad-free service such as Netflix, the need for rigorous, transparent and market-defined viewership is much less, if not unnecessary, as you as a viewer have already delivered value through your subscription payment. In return, Netflix has to convince you even more with its content that they are also worth next month's subscription. Precisely this change in the distribution of power can create increased value for the media consumer. If Netflix is to keep its paying users, reaching out to many is no longer enough. The content must also be relevant to the individual and unique among the content of the many other services in the market.

The media market today is significantly more complex than the media market yesterday, because the new has not yet replaced the old, and business models and media offerings appear and complement each other, while the use of media itself has also become more difficult to define. Where the



definition of a television station was previously completely clear and unambiguous, it is nowadays more difficult as the media houses and television stations are now trying to balance several business models and therefore feature both classic television channels and streaming services under one and same name.

### **The changes of the future**

In 2019, Beverly Hills 90210 was relaunched in a new edition, and in the second viewing of the aging high school gang from the 90s, we may have had a slight taste of the future. Because even though the old episodes are still available for a nostalgic reviewing, the series has been recreated in a new form that does not necessarily tie in with the desire to re-create the broad popular appeal of the old series, but to a greater extent it is made more like a meta commentary for the purpose that hardcore fans and nostalgics may recapture the magic of the series with a certain twinkle in their eyes. This is exactly the point where it is not necessarily about creating large programmes for the many, but rather about focusing on creating specialised content for a variety of very specific target groups, that the new user-paid business models come to their own. We are already experiencing this today, and we will certainly see much more of this in the future.

In a media world where the subscription model is becoming increasingly dominant, common market standards will have more difficult conditions. The need for a common viewership will diminish, and the television industry may no longer be talking about how many viewers they had at last Friday's big entertainment show or at last Sunday's drama series as each of us get the content from our own specialised service. And even if we were to be on the same service, the algorithm will try to offer targeted content just for you. The movement from ad-funded to subscription-funded models is changing and increasingly personalising the media buffet we all face, and where viewers' attention comes more into focus than their mere presence.

Looking at the future from a user perspective, nothing suggests that the traditional TV behaviour where we watch the same programme at the same time is about to disappear altogether. This behaviour will more likely live side by side with the on-demand behaviour, where we may see the same content but at different times, and the more disconnected streaming behaviour, where not only the time of use but also the content we watch is individualised. Thus, as long as there are multiple ways to use media and many distributional business models - in many cases interacting with each other - more than one metric will increasingly be needed to assess the value of the content, and the broad consensus on one common way of talking about success is under pressure. So perhaps the benchmark of success in the future is not only the number of eyes directed at the content, but also the users' perceived value of the content.

**ABOUT THE STUDY**

The figures in the study originate from the Kantar Viewer Study



2019

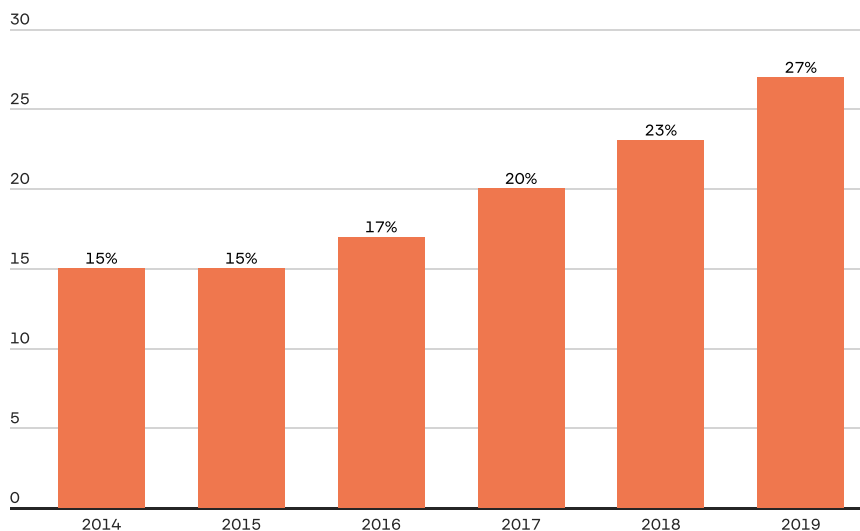
## Record many mature streamers

The mature Danes are among the most digital elderly in the world and represent a huge potential for the streaming market, which is reaching a saturation point among young users. The elderly juggle with fewer streaming services than the young, but once they develop a taste for streaming, they don't look back.

BY HENRIK GREGOR KNUDSEN & JAKOB VIKÆR HANSEN

Over the course of five years, the number of Danes between the ages of 47 and 75, who stream films, series and programmes, has almost doubled. Every fourth in this age group now streams at least weekly, and at the same time the number of mature streamers, who at some point have tried to stream, has increased to 60%. One of the reasons is that several of the mature Danes, who have worked in front of a computer and have run into digitalisation, have now moved into another age league. Another reason is the Danish society that places high demands on the citizens' digital skills - skills that the mature Danes are good at adapting. A third reason is the knock-on effect originating from digital native children and grandchildren, who can help with both mobile and mail, but who you also have to follow on WhatsApp and Snapchat if you want to keep in touch with them. In addition, children and grandchildren can help show how easy it is to stream Bonderøven outside the opening hours of the TV channels.

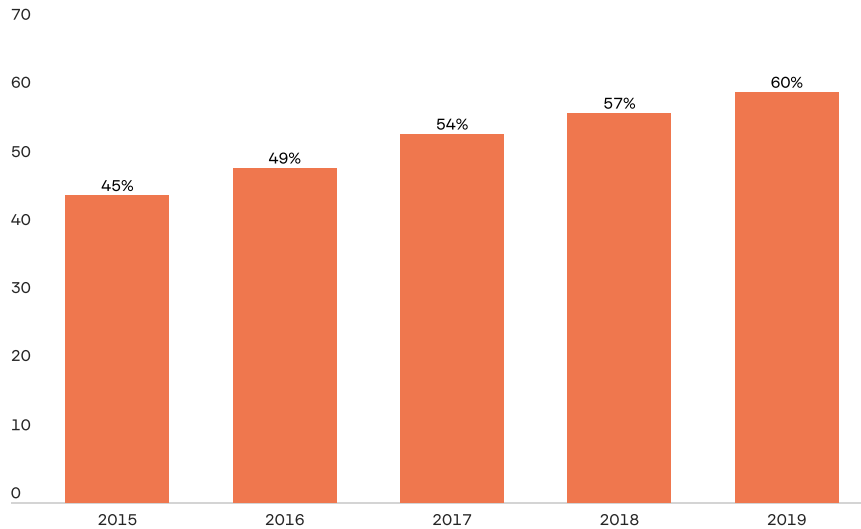
### Percentage of 47- to 75-year-olds, who stream weekly



Target group: 47-75 years, Period: Q2+Q3 2014-2018 and Q4+Q1 2019, Source: Kantar Index Denmark

It is not a sensation that more elderly people are streaming, and percentage-wise the young people, who are streaming weekly, are still predominant. However, when counting by the thousands, it is not insignificant that Danes over 47, who make up almost half of the population, increasingly take streaming to heart. If we imagine that half of the Danes over the age of 47 stream weekly, there would be just as many streamers in this age group as there are 15- to 31-year-olds - altogether.

### Percentage of 47- to 75-year-olds who have tried streaming



Target group: 47-75 years, Period: Q2+Q3 2014-2018 and Q4+Q1 2019, Source: Kantar Index Denmark

### Moving TV behaviour to streaming services

Not surprisingly, the number of streaming services used by the elderly is lower than the number used by young people. Users over the age of 65 use an average of just over two services, while the 47- to 64-year-olds use three services on average. This is half as many as the young people, who use between four and five services, and this reflects, among other things, that the mature users are more adherent to what they know. Their loyalty typically lies with Danish broadcasters such as DR and TV 2, and although the distribution channel is different, the content is the same. But once the elderly start streaming, they spend more time on the services at a time than the young. Young streamers probably do spend more time on foreign services such as Netflix and YouTube than the elderly, but on the other hand the older users spend more time on Danish services such as DRTV and TV 2 Play than the young.

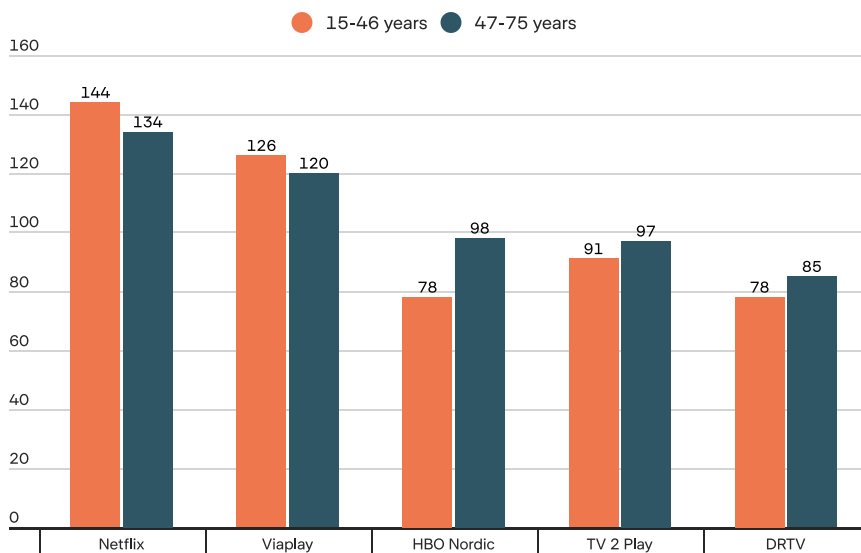
The streaming behaviour of older users thus to a greater extent reflects that they have grown up with traditional television. Where young people search for content such as entertainment and binge-watching series, the mature users are increasingly looking for news and topicality, which they know from traditional television. The common denominator across the years of birth is film, documentary and Danish content.

Another big difference is how the streaming services are perceived. For the young, it is now natural to start the evening on streaming, while older users - even those who stream frequently - continue to use streaming to catch up on the content they did not have time to watch on TV and thus use it as a supplement. Now the question remains for how long it will be this way.

### Huge potential

The digital elderly represent a huge potential for the streaming services. Almost half of the Danes are over 50, and often the mature Danes have both the time and the money to immerse themselves in the streaming services' burgeoning lists of content. At the same time, there are indications that the market among the young is becoming saturated, which means that if the subscription base is to be expanded, the streaming services must necessarily look for new customer groups.

## Time spent yesterday on streaming services among the users (minutes)



Period: 2018, Source: Kantar Digital Life

While the commercial TV stations make money on selling commercials to a younger audience, age matters less for the streaming services, as their business models are often based on subscription revenue: DKK 99 is DKK 99, whether a 27- or a 67-year-old pays the bill. This differs from the commercial TV market, where a 67-year-old will typically be unattractive to the advertisers, who pay primarily to reach a younger target group.

The mature Danes are also relatively easy to convert from traditional TV to streaming for media houses such as DR and TV 2. If you already have a faithful older audience, who are happy to see *Badehotellet* on TV, it is relatively easy to attract them to a streaming service with the promise that they can watch or watch once more all seasons exactly when it suits them.

The huge potential of the mature streamers has probably already influenced decisions about the type of content being commissioned, and the trend will be even more pronounced in the future. A series like *Grace and Frankie* from Netflix, starring Jane Fonda and Lily Tomlin, both of whom have turned 80, is hardly made to capture Millennials or Generation Z. The same is true for a period drama like *The Crown* and the comedy series *The Kominsky Method*.

### A grey future

Looking at the development of streaming consumption a few years back, it is clear that it is especially the 47- to 64-year-olds, who have driven the growth, while older people over 65 slowly but surely find their way to the streaming services. This development will continue as media houses gradually shift their focus to digital platforms, the natural separation of non-streamers as well as the supply of new and more digital elderly. And the streaming services cannot disregard the group of mature streamers, as they are a goldmine.

#### ABOUT THE STUDY

Data in the article originates from a survey of the Danes' streaming habits conducted by Norstat for DR Audience Research in October 2019, the Kantar Viewer Study, Kantar's Index Denmark and Digital Life and background knowledge from, among other things, Statistics Denmark.

There will be some natural limitations in connection with many elderly people, who have not been used to swiping, casting and bingeing, and some may not want to give up their regular routines and evening coffee rituals either. However, others will welcome the many new opportunities when first they develop a taste for it. And what effect does this have on the TV market? Well, in 2009, the over 47-year-olds accounted for 49% of the time spent on the TV media. In 2018, 10 years later, that figure had risen to 72% as a result of young people abandoning the TV media. If we imagine

that the over 47-year-olds reduced their TV usage by just 10%, it would result in the entire TV media losing 7% of the time consumption.

We are facing a 'greyer' future - a future that may give us a new type of content and new viewer patterns. Older users will gradually swap the remote with Chromecast and smartphones and slowly see a new world open to their eyes.

#### Read on

- Why the more than 47-year-olds? DR Audience Research works with Life stages, a division of the population based on their media usage. Read more about the Life stages [here](#)
- Statistics Denmark: [Danish elderly are the most digital in the EU](#)
- Statistics Denmark: [IT use in the population](#)





2019

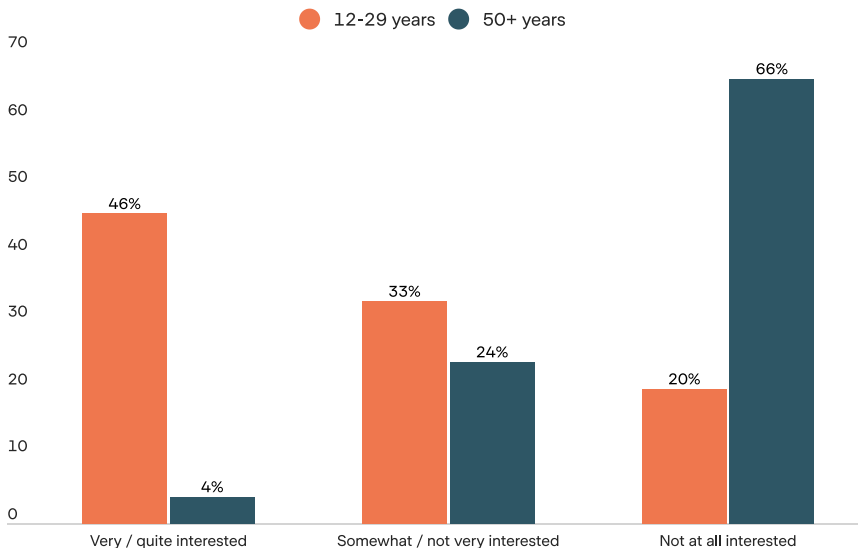
## Esports on the edge of the big breakthrough

Esports is far from a new phenomenon, but has only really made its way into the big media scene in Denmark during the past few years. However, the big national breakthrough is a long time coming, and we have taken a closer look at the potential and the barriers of esports to understand where the esports is heading - and how it can grow from being big to being broad as well.

BY ALLAN LYNGSIE NILAUSEN & JAKOB VIKÆR HANSEN

One does not have to look long to find esports success stories. Worldwide revenue is constantly growing, superstars are winning huge prize money, and live broadcasts are being watched by millions of viewers from sold-out arenas worldwide. Esports is not a new phenomenon, but it has really grown in line with the penetration and the speed of the Internet, which is relatively cheap in Denmark compared to other countries. Optimal structural and technological conditions combined with professionalisation of teams and clubs as well as the cultural embrace from associations, schools, municipalities and investors have seriously put Denmark on the world map of esports.

### Interest in gaming and computer games

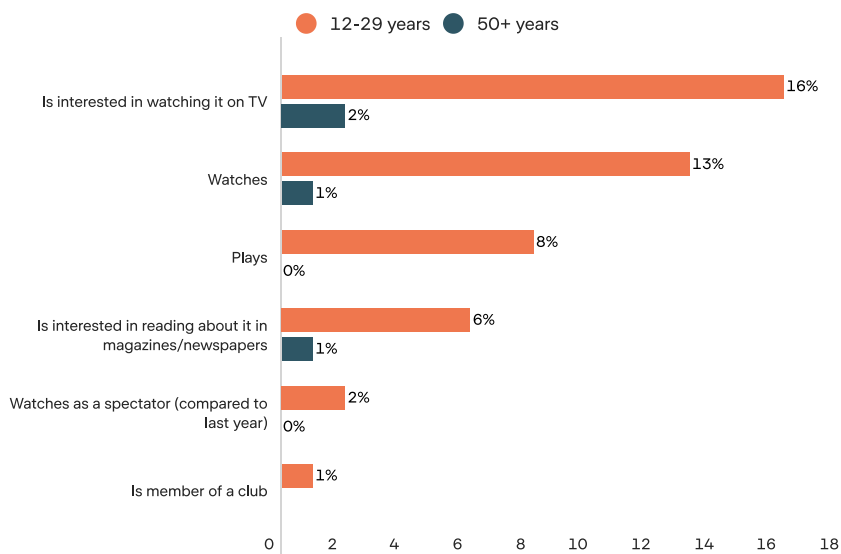


Period: 1H 2019, Source: Kantar Index Denmark

According to Statista, Denmark is the country with the most esports athletes per capita and among the most successful countries in terms of prize money earned. And according to DGI, despite a modest 5,000 registered members, esports is the fastest growing sport in Denmark. A large part of the population has become accustomed to playing computer games on console or PC, in the same way that most Danes have played or play some kind of sport.

Despite the many success stories about the golden age of computer games, audience ratings on Danish TV channels do not yet testify to the same width that characterises the greatest sports in Denmark. At the 2017 final of the Blast Pro Series at the Royal Arena, nearly 100,000 viewers watched DR3 during the finals, hereof a large number of viewers under the age of 40, which was a surprisingly high figure at that time. Two years later, at the ECS Season 8 Finals in Arlington, the figure was significantly lower despite the many success stories. Both finals had the Danish team Astralis as a participant. Although there are also Danish viewers on services like Twitch, still very few Danes use Twitch regularly - in 2018, according to Kantar, 5% of Danish households - and typically it is young men, who are active on the streaming service. Based on this, it is hard to imagine that there would be hundreds of thousands of extra viewers on Twitch in the older target groups.

### Interest in esports



Period: 1H 2019, Source: Kantar Index Denmark

#### What is esports?

Esports is a contraction of the words electronic and sports and covers the organised playing of computer or console games as a competition form with tournaments, spectators, prizes and ranking of players.

Gaming covers the hobby-based playing of electronic/digital games, whether through consoles, computers, mobile phones or another medium.

Source: Ministry of Culture, Cultural Habits Survey 4th quarter 2018, Newzoo

#### Esports is big, but not broad

The figures from recent years show that esports is indeed big and growing but not yet broad and popular, such as football and handball. Denmark holds a large group of interested and dedicated esports fans, 14% of the population, but outside of this target group, esports has apparently neither caught the attention of the viewers nor has it become popular yet. Although the comparison with football and handball in many respects is difficult, it is still relevant to take two of the most popular sports in Denmark into consideration in order to understand how the Danes relate to sports in the media and where esports may score new viewers and gain greater breadth.

According to the [sports segmentation](#) of DR Audience Research, approx. 3 out of 4 Danes are to a greater or lesser extent interested in watching sports in the media. 20% are Sports nerds, who cannot get enough and who watch all types of sports, while 7% are Specialists, who selectively watch one single sport or one specific athlete. Between the Sports nerds and the Specialists in one group, and the 24% of Danes, who are not at all interested in sports in another group, you find the remaining half of the population that we de-

scribe as the Slightly interested (20%) and the Event watchers (28%), respectively. Among these segments, interest in sports is mainly associated with nationality and local roots. In short, these segments watch the media as national teams participate in major events such as the Olympics, the European Championship and the World Cup, when their local handball or football teams play, or when Caroline Wozniacki is successful at the Australian Open. The interest is thus tied to a geographical and emotional community, where you share successes and disappointments in victories or defeats for your local or national team with those close to you.

But what does esports have to do with it? Well, it is interesting to look at esports through this segmentation of the Danes, because the challenge of esports is apparently not the lack of nerds or specialists, who watch esports and who are active athletes, are participating in tournaments or are just deeply involved in the sport. The challenge is rather that the group of not interested, event watchers and slightly interested people within esports is too large. Hence the lack of breadth.

Where event watchers and those slightly interested may be enticed to watch football or handball matches with their spouse, children and friends, even if they are not particularly interested, it remains difficult to entice the older Danes - and primarily the women - in these target groups to watch esports. And here we find the potential new target groups that esports needs before they can switch from the niche and streaming channels to the main channels in prime time.

Because even though the legendary TV programme Troldspejlet has now moved from a children's channel to DR2, and many adult Danes today have grown up with Atari, PlayStation and World of Warcraft, and despite favourable technological conditions, it seems that esports has not really caught their attention yet.

### **Esports is on the right track**

When we dedicate an entire article in Media Development to esports, it's because the potential is huge. For new generations of Danes, playing CS:GO or FIFA is as natural as playing football and handball, and from a media perspective this development is extremely interesting. The above audience ratings emphasise that the media phenomenon of esports has enormous potential that is not far from being realised.

What esports still lacks is to activate the Danes, who are not directly absorbed in computer games. According to the sports segmentation, many Slightly interested and Event watchers are neither active nor interested in sports on a daily basis, yet sports such as football and handball manage to engage a large proportion of these users in significant matches, derbies and final rounds. Nothing suggests that esports cannot use the same instruments that these sports: Attractive media products with excitement, heroes, villains and something at stake, combined with glitter and glamour at big tournaments. And many of these instruments are already in place.

Esports may, among other things, be inspired by the format. Many esports tournaments run over several days, while international matches and matches in the Danish football and handball leagues are held within a few hours. It doesn't take much time to keep up with the Premier League two hours a week, whereas a CS:GO tournament running from Friday to Sunday will make it harder week after week to set aside time for it. In addition, as mentioned earlier, there is the geographical connection to a city or a national team. The eSuper League is an example of how this association is used to optimise the interest in the FIFA tournament, and it seems to be a step in the right direction.

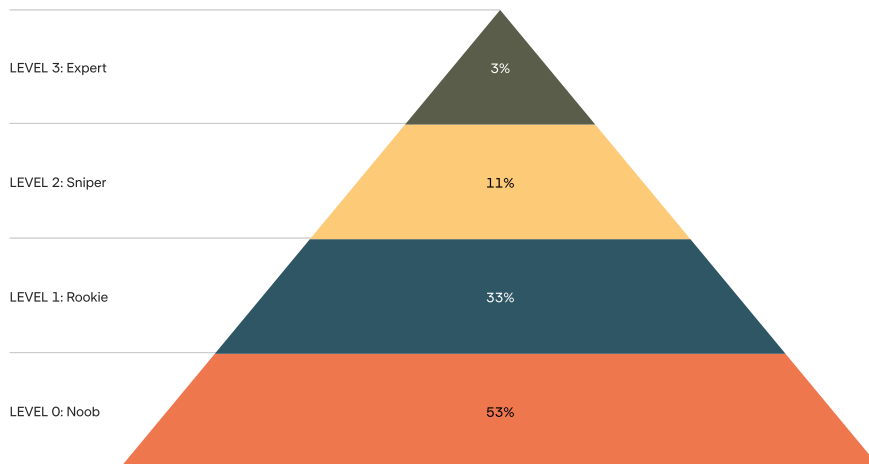
While it is not controversial for esports that several competitions are based on shooting opponents in the head with an automatic rifle or fighting the enemy with fire, the violent elements are nevertheless something that many in the general population will find difficult to disregard. Young generations easily understand the terms and rules, but older generations may find it difficult to understand, just as talent can be hard to see in a sport you don't know. However, this barrier will lessen over time as the digital generations grow older.



And it is precisely the element of time that points to the fact that esports may face a great future. Both handball and football, but probably to the greatest extent the latter, have historically influenced the affiliation and arch-enemy matches that make these sports interesting to the general population. Fans have often inherited the love for a club from their parents, and due to the lack of esports history, this part is still developing. But in a few years, maybe when a Danish esports team compete in the Olympics, or when parents have taught their children about the successes of Astralis, esports may, if they manage to spread the sport to the yet uninitiated, develop in the same direction as football and handball.

## Esports segmentation

Inspired by the broad [sports segmentation](#), we have here tried to segment the Danes in terms of their interest in esports.



Target group: 12+ years, Period: 1H 2019, Source: The segments are inspired by and based on data from Kantar's Index Denmark

### LEVEL 3: Expert (approx. 3% of the population)

The Expert is member of an esports club, plays esports in other contexts or watches esports as a spectator. The Expert knows everything about what is happening in the esports market and naturally watches tournaments on Twitch or YouTube, unless he or she has not gone to see the tournament itself. The Expert is typically a boy or man between the ages of 12-29, who is a gamer himself, while some Experts are found in the 30- to 39-year-old group. There is a slight overweight of this segment in Northern Jutland and Zealand.

### LEVEL 2: Sniper (approx. 11% of the population)

The Sniper is generally interested in esports but watches from a distance. The Sniper watches, among other things, in the media, on TV, YouTube and websites etc. However, interest, or time, does not allow for playing the sport as an active member. Also in this segment there is an overweight of men between the ages of 12-29, but you also find Snipers between the ages of 30-49 and some individuals of even higher age. The older the Sniper gets, the more time seems to be spent on family obligations, and the less time there is to pursue the interest in sports.

### LEVEL 1: Gamer (approx. 33% of the population)

The Rookie plays computer games on PC or console at least once a month, and is interested in computer games in general. The Rookie is found at most age levels, and although there is also in this segment an overweight of men, also some women are represented. As mentioned, the Rookie occasionally plays on his PC or console, but either has no interest in or time to watch tournaments - and in the negotiation with the partner on what to see on the big screen, it will rarely be the esports that win. However, if the conditions are right, it will be possible to convert the Rookie to watch esports.

### LEVEL 0: Level 0: Noob (about 53% of the population)

Has no interest in esports in its current format, and 4 out of 5 of these Noobs are not at all interested in console and computer games. The Noob thinks that CS:GO is a travel agency and that StarCraft is a Pink Floyd album from the 70s. However, the Noob may well be attracted to develop an interest in computer games if the sport is wrapped in real-life stories such as [this article](#) from dr.dk. The personal angle may be the Noob's way into the sport. There are more women than men in this segment and the average age is also higher than in the other segments.

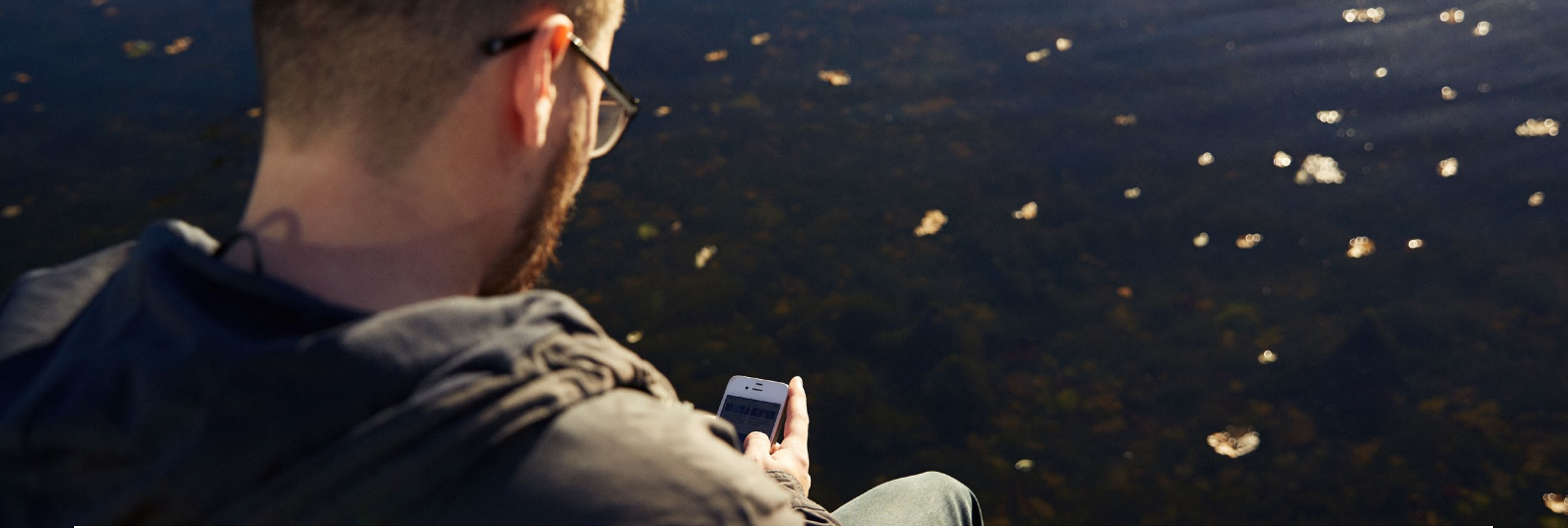
Source: The segments are inspired by and based on data from Kantar's Index Denmark 1H 2019

#### ABOUT THE STUDY

The figures in the study originate from the Kantar Viewer Study, Kantar Index Denmark and several other sources, including DGI, Statista and the Ministry of Culture.

### Read on

- [DR Audience Research sports segmentation](#)
- [Denmark gets an esports strategy](#)
- [We are the best in the world at esports: But why, really?](#)
- [Esports races ahead in the associations](#)
- [Esports is growing into society](#)
- [Only when Mats was dead did his parents understand the value of his gaming](#)



2019

## This app would like to send you notifications

The mere thought of receiving notifications on the phone may send vibrating shivers down the spine of most people. The number of attention-demanding apps is increasing, but still sometimes a valuable notification pops up, so who dares to get rid of the vibrating interruptions? It might be...

BY JULIE SCHWARTZ & SOFIE SCHEUTZ

Almost all Danes receive notifications from apps on their mobile. Eight out of ten Danes, who receive notifications on their smartphones, have at one point turned off notifications, and more than half have once or twice deleted an app because of its notifications. Many different apps are pushing messages out to the Danes every single day. Everything from a Wordfeud friend, who has made a move, to the news about a football coach, who has been replaced with someone else, whose name you also don't know, or a reminder that you are missing 2,500 steps to reach today's target.

### Smartphones and apps in Denmark

94% of the Danes have one or more personal smartphones.

Among Danish smartphone owners, 49% have an iPhone, 21% a Samsung and 16% a Huawei

Smartphone owners have on average 21 apps that they can remember when asked

Source: Kantar Mobile Life 2019, Target group: 12+ years

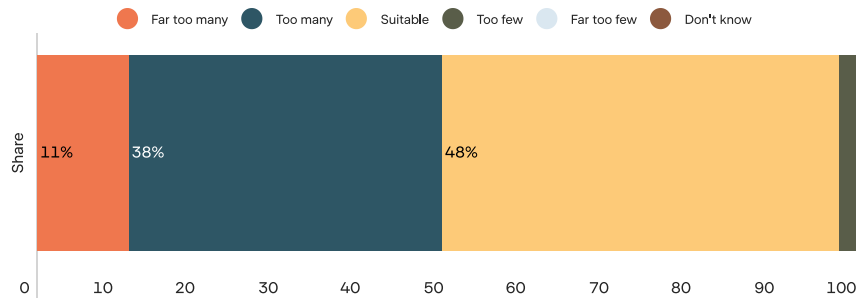
Some notifications feel more valuable than others. For example, who wants to miss out on a sweet message on Messenger, a reminder that a package can be picked up, or some important breaking news from a media house? DR Audience Research has in a survey asked the Danes about their experience of the notifications they receive: What value do they provide and how are they handled?

### Notifications are queued

It is particularly the notifications from mail and message apps as well as social media that the Danes let vibrate on their mobiles. Many people are used to being presented with their daily screen time consumption on the mobile's built-in app, but if you venture even further into your phone's surveillance recesses, it may even reveal

how many notifications you receive each day - not to mention how many times you unlock your mobile to check anything and everything. You might be just as surprised as were the authors of this article. Many times a day we open the mobile to check, remove or ignore the many notifications queuing on the locked screen. And maybe even more often we cast a sidelong glance at it just to find that nothing important was buzzing at us.

## What do you think of the number of notifications you receive from your news apps?



Target group: 15-46 years, Period: 2019, Source: DR Panel

The survey shows that the young people receive the most notifications, but they are also the ones, who turn off the most notifications or completely delete apps to avoid vibrating interruptions. Thus, young people are better at picking the notifications that they allow access to their attention, where older people simply live with the notifications that pop up, and feel that there is not so much to do about it. According to the respondents of the survey, it is primarily the degree of importance of the notification as well as the fear of missing out on something, which matters most to the behaviour, when it comes to the attention we give the mobile phone.

### The reflexes are fine

There is a difference between how and how quickly we respond when a notification pops up on the screen. We often throw a glance at them, but what reflexes it triggers depend on the app that demands our attention. A notification from an email, a messaging app or the social media is usually checked immediately, while a notification from, for example, games, sports and health apps is checked when we get the time - and often not at all.



(FOTO: MIKKEL CARDEN © DR AUDIENCE RESEARCH)

Declarations of love and calendar invitations are fighting for our attention side by side with news and new episodes of our favourite podcast, and thus all notifications flow together into a sea of disruptions where, as a regular user, one may feel annoyed over having unnecessarily pulled the phone out of one's pocket:



### Nobody gets too little

*I was disappointed when I opened my phone and it was just a news notification and not a message.*

MAN, 24 YEARS OLD, CENTRAL JUTLAND

The media houses are among those, who fight for our attention. Breaking! Today's overview. Top story. LIVE - watch now. The survey suggests that the users' mobile phones are about to overflow, because while the news media shoots off one news notification after another, half of the Danes using news apps are left feeling that they are receiving too many notifications from the news apps. In other words - nobody gets too little. This may not be surprising, as using more than one news app is normal. For the same reason, news apps may quickly get into the danger zone and risk being deleted altogether if their notifications do not stand out in the crowd as being particularly valuable.

## When the news notification is worth something

Even though the sea of notifications is large, some news notifications may still achieve the status of being good and relevant messages, and some users even explain that it is nice to have a small stock of them on the phone. One might talk about saving up notifications for a spare moment.



*It's nice to have an idea of what to check on your phone later.*

-WOMAN, 39 YEARS, THE CAPITAL

Breaking news and top stories are some of the types of notifications that many Danes receive if they have downloaded a news app. They may be a convenient way to make sure to be notified if the world falls down. The media houses want to be the first with the latest, but if we ask about the Danes' motivation to receive news notifications, it is neither about getting the news before everyone else nor about being able to revel in being the first to break a story among friends.

Most valuable are the notifications that have an impact on the day's progress: Notifications that fall directly within the user's area of interest or simply notifications that are sufficient in a way that the user does not have to click into the news app to make it make sense.

### Tipping point versus FOMO

Many Danes are currently in the dilemma between irritation over getting too many notifications - including notifications from news apps - and the fear of missing out on something relevant if they start turning off some types of notifications.

Forgetfulness, laziness and hassle are often the excuse for not turning off notifications, but when the quantity gets too overwhelming, it is easier to go with the young's easy solution, e.g. to give it the thumbs down and delete the app. But it is difficult. The mere thought of missing out on something can make your phone phantom vibrate in your pocket.

### Three valuable types of news notifications according to users

- A news notification is valuable if it couldn't wait until later: "There was an explosion on Nørrebro and all buses had been rerouted. The bomb exploded approx. 400 meters from my building, so I knew I had to cycle another way home than usual as roads were blocked."  
- Man, 24 years, the capital.
- A news notification is valuable when the user can reflect himself in it or when the news falls within his area of interest: "It was a news message that every third high school student had seriously considered dropping out. It is relevant to me as I am one of them. It actually gave me a small mood boost to know that I wasn't alone."  
- Man, 18 years, Northern Jutland
- A news notification is valuable if the user can read and fully understand it without opening the app: "It provides enough information so that I don't always need to open the app to know what happened."  
- Woman, 21 years old, Central Jutland.

Source: DR Panelet, September 2019, Target group: 15-46 years

### ABOUT THE STUDY

The study was conducted in DR Panelet in September 2019 among Danes between the ages of 15 and 46.

2019

# Women are from Kanal 4, Men are from TV3 Max

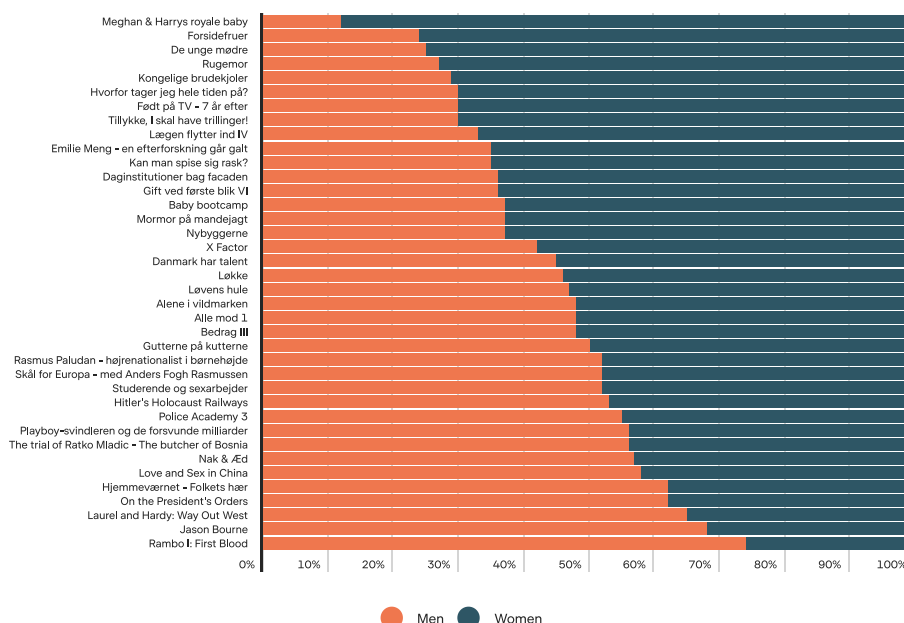
We are far from gender experts, but we do know something about media and media usage. And when you look at the media usage of the Danes in 2019, it comes to mind that men and women have quite different habits. Rambo has an overweight to male viewers, while royal events have the most female viewers.

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But the truth about the Danes' media use is of course far more nuanced. Because although the extremes are very caricatured, many TV programmes are actually found right in between, and still a lot of content can bring together the genders in front of the telly.

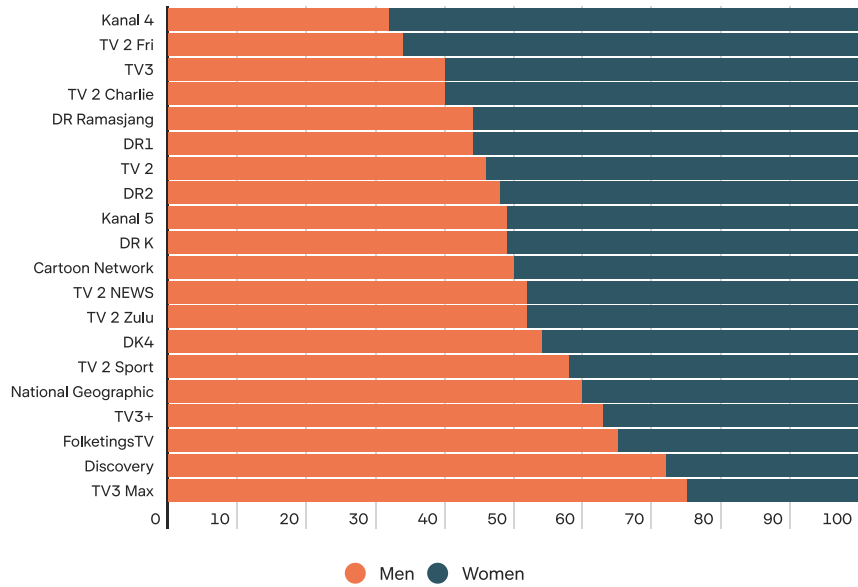
In the graph below, you can find out about the genders' favourite content and get inputs on how your gender is expressed in your choice of TV programmes - are you mostly into testosterone-pumped action films, something about royal babies or are you just like most of us: somewhere in between or a little bit of both?

## Gender distribution on selected television programmes



Target group: 3+ years, Period: 2019, Source: Kantar Viewer Study, Data: Live + VOSDAL

## Gender distribution on 20 selected television channels



Target group: 3+ years, Period: 2019, Source: Kantar Viewer Study, Data: Live + VOSDAL

## Subjects of interest

Women	Men
Children, relationships and family	Society, politics and military
Murder/crime	Outdoor activities
Wellness/health	Sex
The royal family	Action films
Celebrities	Sports

Target group: 3+ years, Period: 2019, Source: DR Media Research

### This is how we did it

We have extracted programmes from the TV meter measurement in 2019 and distributed them by gender. At one end are the programmes that are watched by close to 100% women and at the other end those that are watched by almost 100% men.



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#### **DATA SOURCES**

Adobe

Statistics Denmark

DMA Research

Kantar

Megafon

Norstat

Podcastindex.dk

#### **OTHER SOURCES**

Gallup Local Radio Index

Instagram

MediaWatch

Netflix

Radio24syv

SVT

YouTube

#### **DR PANELET**

Data in this publication also comes from studies conducted in DR's own Internet panel, DR Panelet. DR continuously uses DR Panelet for examining the Danes' media habits and perception of media content. Everybody over 15 years of age and a resident of Denmark may become a member of DR Panelet. You may join DR Panelet and read more about it on [dr.dk/drpanelet](http://dr.dk/drpanelet).

#### **IN BRIEF ABOUT DR AUDIENCE RESEARCH**

DR Audience Research is DR's own analysis department. It is an independent department, which has the purpose of giving listeners, viewers and users a perspective of DR's many products and the possibility to follow the media trend.

In 'Media development' we gather the results from selected studies and analyses that we have implemented during the previous year. The analyses in the publication have been selected on the basis of an assessment of whether the stories may be of interest to others. None of the analyses are made merely for the purpose of publication.

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#### **FURTHER LINKS**

Download Media Development 2019 at [www.dr.dk/medieforskning](http://www.dr.dk/medieforskning)

#### **ENGLISH VERSION AVAILABLE AT**

[www.dr.dk/aboutdr](http://www.dr.dk/aboutdr)

The material may be quoted with clear source reference.

#### **DESIGN**

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