

No. 2, 2017 (September)

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Media use

Radio listening in the Nordic countries 2016

Radio | Nordic June 2017 | EH

More than seven of ten Nordic people listen to the radio every day, via FM/DAB or live transmissions online. This means that listening to flow radio remains fairly stable. Podcasts, however, are still for the few. This is shown in Nordicom's compilations of 2016 radio data in the Nordic countries.

The industry's official radio data, on which Nordicom's statistics are based, include analogue and digital flow radio. (Data do not include on-demand radio and podcasts.)

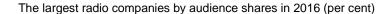
Stable listening, but decrease over time

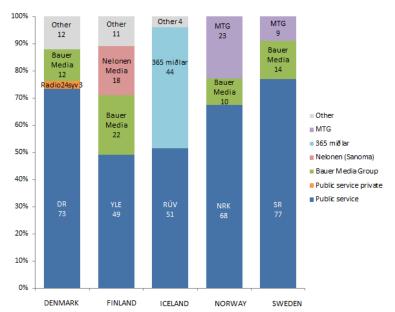
In 2016, seven of ten Nordic people listened to the radio on a daily basis, which is the same level as the year before. Listening time, however, decreased slightly in Denmark, Iceland and Norway, increased in Finland, and remained unchanged in Sweden. In all countries, older people listened more to radio than younger people. Still, seen over a longer period of time, radio has dropped in both reach and listening time in all age groups.

Strong public service radio

Among the broadcasting companies, public service radio stands for the largest combined audience shares. In Sweden and Denmark, public service radio accounts for more than three quarters of the listening time. In Sweden SR stands for the entire share (77 per cent), while in Denmark DR and the privately owned public service channel 24syv account for 73 and 3 per cent, respectively.

NRK in Norway has slightly more than two-thirds of the listening time, while Yle in Finland and RÚV in Iceland claim about half of the listening time in their respective countries.





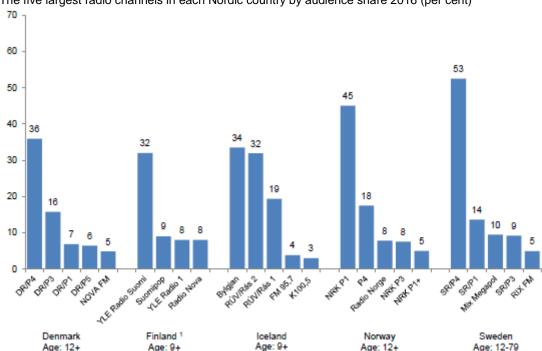
Sources: Kantar TNS Denmark, Finnpanel, Gallup Iceland, Kantar TNS Norway, Kantar Sifo Sweden. Download full-size graph (PDF) Download table (excel).

The Nordic private radio sector is dominated by a few major companies, of which two have strong positions in several countries: Bauer Media, with operations in all Nordic countries except Iceland; and MTG in Norway and Sweden. Bauer Media is the largest commercial player in Denmark, Sweden and Finland, while MTG Radio is the largest in Norway. In Iceland the domestic 365 Media (365 miðlar) is the major commercial player.

Digital channels on the top-five lists

The major radio channels have lost listeners over the years, but still maintain a high reach and a significant share of the listening time.

In every Nordic country except Iceland, one broad public service channel dominates: DR P4, Yle Radio Suomi, NRK P1 and SR P4. All are generalist channels, with a mix of national and regional broadcasts. Iceland's two major channels – Bylgjan, the country's nationwide commercial radio station, and $R\acute{U}V2$ – each has around a third of the listening time.



The five largest radio channels in each Nordic country by audience share 2016 (per cent)

1) In Finland, the fifth position is shared by YLE Radio Vega/Radio X3M, Radio Rock and Iskelmä (4 per cent audience share, respectively). Sources: Kantar TNS Denmark, Finnpanel, Gallup Iceland, Kantar TNS Norway, Kantar Sifo Sweden. Download full-size graph (PDF) Table: Channel's audience shares 2000, 2005-2016 (Excel)

Parallel to the major channels holding their positions, new channels have found their audiences. In 2015, digital channels from DR and NRK entered the top-five list of channels with the highest audience share. In 2016, DR's digital channel P5 ranked fourth on the list and NRK's P1 + fifth. Both channels focus on adults or older listeners.

Podcasts still for the few

The output of digital audio media – such as FM channels' webcasts, digital channels, programmes on demand, podcasts and streaming music services – is increasing. And the same is true for access to and listening via digital devices.

Still, listening to on-demand radio or podcasts is limited, and the previous growth seems to have stopped, according to DR Audience Research in Denmark and Kantar Sifo in Sweden. In Denmark, one in ten Danes listened to podcasts weekly in both 2015 and 2016. In Norway, two per cent of the population listened to podcasts in 2016 (Norwegian Media Barometer survey). We have no data for Finland or Iceland.

In Sweden, 12 per cent of the population listened to online radio/podcasts weekly in 2016 – an increase from 9 per cent the year before – but the data also include listening live on the web. The most avid listeners are 25-44-year-olds (Swedish Media Barometer survey).

What is happening in digital Norway?

The most important change on the Nordic radio market is currently taking place in Norway. The closing-down of the FM network began in January, and in 2017 the nationwide radio will be fully digitalized. But what is happening to radio listening in the world's first transition from FM to DAB? New measurements indicate decreased listening, but as to what will have happened in a full-year perspective, we will know this at the beginning of 2018. (Meanwhile, see Kantar TNS's presentation from January 2017: The world's first FM switch off: What happens to the listening?)

Download tables from Nordicom's table database (Excel files):

Daily radio listening time 2000-2016
Daily radio listening time by age 2008-2016
Radio channels' audience shares 2000, 2005-2016
Public service radio audience shares 2000-2016

Daily radio reach 2000-2016
Daily radio reach by age 2008-2016
Radio channels' daily reach 2000, 2005-2016
The five largest radio channels/networks per country by daily reach 2016 – graph
Daily radio reach by age for public service, commercial radio and total radio, 2016

More tables are available in Nordicom's table database (choose Nordic countries - Radio)

About the statistics: Nordicom compilations are based on data from the national survey institutes responsible for the official radio surveys. Differences in methods impair comparability between countries and years; see "Radio surveys in the Nordic countries, basic facts" (Excel). Data are compiled both directly from the national survey institutes (reports and websites) and through our Nordic network: Danish Agency for Culture and Palaces, Statistics Finland, Statistics Iceland, medianorway and Nordicom-Sweden.

Main sources:

DR Audience Research Department: Media Development in Denmark 2016 (data from Kantar Gallup Denmark)
Danish Agency for Culture & Palaces: Mediernes udvikling i Danmark 2017 - radio (in Danish)
Finnpanel: Radio listening in Finland 2016

Gallup Iceland (in Icelandic)

Kantar TNS Norway: Årsrapport for radiolytting i Norge 2016 (annual report in Norwegian)

Kantar TNS Norway via medienorway's database (in English)

Kantar Sifo: Radiolyssnandet i Sverige 2016 (annual report in Swedish)

Digital News Report 2017

News Consumption | Nordic August 2017 | EH

People in the Nordic countries are among Europe's most avid users of smartphones for reading news online. They are also the most willing to pay for online news. These are some of the findings in the Digital News Report, which compares online news consumption in 36 countries, including Denmark, Finland, Norway and Sweden.



The Reuters Institute for the Study of Journalism has published its sixth annual report, looking to track and compare changes in online news consumption across countries. Its scope has been expanded from 26 to 36 countries. The key focus is Europe, even though, e.g., Canada, South Korea, the US, Brazil and Japan are also included.

Sweden at the top in using smartphone for news

Mobile marches on, outstripping computer access for news in an increasing number of countries. In Sweden, already last year it was more common to access news from a smartphone than from a computer or laptop; in 2017, this is also true for Denmark and Norway.

In Sweden, almost seven of ten use their smartphone to read news, which puts the country at the top of the European list. In Denmark and Norway, around six of ten use a smartphone to access news each week, which ranks them among the top ten European countries as well. In Finland, the only Nordic country where the computer is still the most used way of reading online news, the share of mobile users for news is slightly lower.

Devices for news 2017 (per cent)

	Denmark	Finland	Norway	Sweden	All
Computer	54	64	29	55	58
Smartphone	60	56	62	69	56
Tablet	36	26	32	32	22

Survey question: Which, if any, of the following devices have you used to access news in the last week? Base: Total sample in each country. All: Total sample across the study. Source: Digital News Report 2017 (interactive).

As for other mobile devices, around one-third of Nordic news consumers use a tablet for news, making them the most avid users in the survey, with Denmark in the lead across the survey's total sample. Norway and Sweden rank second and third.

Branded websites starting point for the Nordics

Patterns of online news access differ across the countries. People in the Nordic countries and the UK are more likely to go directly to a website or app, while those in other countries prefer a search engine or social media as the key gateway to news. The most popular websites or apps for news in the Nordic countries are legacy media brands, e.g. national dailies or major broadcasting networks (public service and commercial).

Facebook dominates social media news

Across the study, half say they use social media as a source of news each week, which is also true for Denmark, Norway and Sweden, while in Finland the level is slightly lower. Facebook is by far the

most important network for finding, reading/watching, and sharing news in all countries in the study; the Nordic countries are no exception to this.

Despite a small decrease in Denmark, Norway and Sweden in 2017, Facebook maintains a dominant position (highest in Norway with 41 per cent, lowest in Finland with 35 per cent). Among the countries' top five social media for news, Facebook is followed by other global networks. Again Finland is the exception, with a domestic chat/discussion forum, Suomi24, ranking fifth, with 5 per cent using it to read news every week.

Norway has the highest level of online payment

Most consumers are still reluctant to pay for news online. Across all countries only one in ten pays for online news, but the Nordic countries stand out as the most willing to pay. In Norway, 26 per cent have paid for online news in the past year, which puts Norway at the top of international comparisons. Sweden (20 per cent), Denmark and Finland (15 and 14 per cent, respectively) have among the highest level of online payment as well. It should be noted, however, that the share paying for digital news in the Nordic region did not grow from the year before.

Looking at ongoing digital news subscriptions, the Nordic countries top the European ranking. Norway has the highest rate (15 per cent), followed by Sweden, Denmark and Finland (12, 10 and 7 per cent, respectively). To a large extent, this is the result of newspaper subscriptions that combine print and web.

More key findings

Read the full report to learn more about key findings, such as: wide variation in trust in news media (highest trust in Finland); the growth of ad blocking has stopped (around one in four in the Nordic region uses ad blockers); and people are more likely to pay for access to online video and audio services than they are to pay for online news (again, the Norwegians are most willing to pay).

Digital News 2017, full report online Explore the 2017 data at the interactive site

Country reports in national languages:

Denmark: Danskernes brug av nyhedsmedier 2017, RUC Roskilde University (in Danish) Finland: Uutismedia verkossa 2017: Suomen maaraportti, University of Tampere (in Finnish) Norway: Bruksmønstre for digitale nyheter (PDF), University of Bergen (in Norwegian)

Important to note about the survey sample: Because this survey deals with news consumption, anyone indicating they had not consumed any news during the past month was filtered out. The report is based on an online survey, and as such the results will underrepresent the consumption habits of people who are not online (typically older, less affluent, and with limited formal education). The core purpose of the survey is to track activities and changes over time within the digital space – as well as to gain an understanding of how offline and online media are used together. The research was conducted by YouGov, using an online questionnaire, at the end of January/beginning of February 2017.

Media development in Denmark 2017 - English summary

Media Use | Denmark September 2017 | EH

The Danes' media consumption is increasingly based on digital and mobile platforms. But there are significant age patterns in how the use of media and platforms evolves. This is shown in a report on the media development in Denmark, for which an English summary is now available.



The 2017 edition of the annual report on media development, published in June by the Danish Agency for Culture and Palaces, focuses on media consumption. A newly published English summary presents the most important conclusions from the report.

One of the trends observed is the platform and generation gap. Media use is becoming more and more digital, and Internet access via mobile phones and tablets is increasing. Age, not surprisingly, is a very significant factor. Young

people are heavy users of Internet-based digital services, while the older generation typically remains faithful to the conventional media.

Still, the patterns are not totally strict. The report shows that among the conventional media, radio listening increased among the youngest users but fell in all other age groups. And all age groups, including the older generations, are adopting new media and services all the time, albeit at different rates.

The summary also presents six special reports, published as part of the Agency's reporting on media development in Denmark. The special reports have investigated local and regional media content and its role in local communities; the impact of media mergers on local and regional media strategies and content; the Danes' sources of information and news; social media use; ad-blocking use; and media industry finance and employment.

Download: The media development in Denmark in 2017 (PDF)

Find the English summaries 2014-2017 here

The full report in Danish: Mediernes udvikling i Danmark 2017

The special reports in Danish

About the report: This is the fourth edition of the Danish Agency for Culture and Palaces' "Report on media development in Denmark". As in previous years, this year's report was compiled in consultation with an external editorial panel, consisting of seven expert media professionals, researchers and industry representatives.

Norway: Continuing growth of online media use

Media Use | Norway May 2017 | EH

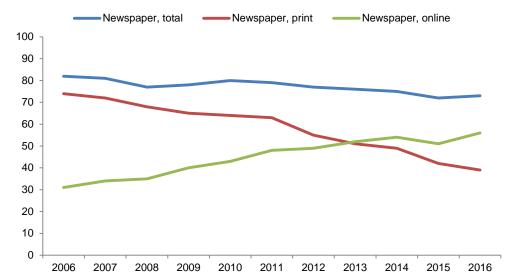
Media use online is steadily increasing, according to data from the Norwegian Media Barometer 2016 survey. More Norwegians are reading the newspaper online, and streaming of both sound and video content is growing. At the same time, linear TV and radio remain at the same levels as the year before.

The annual media use survey from Statistics Norway shows that nine of ten Norwegians use the Internet on a daily basis. Among the Internet users, seven of ten use Facebook and half of the group use other social media. The use of both Internet and social media has increased by a few percentage points from the previous year.

For the first time: print papers under 40 per cent

More than seven of ten Norwegians read the newspaper an average day, in paper form and/or online. For printed newspapers, however, for many years there has been a noticeable drop in reading. In 2014, for the first time, less than 50 per cent of the population read a print paper on the average day, while by 2016 daily reading had dropped to under 40 per cent.

Reading online is increasing, on the other hand, and surpassed reading on paper in 2013. According to the 2016 survey, 56 per cent of the Norwegian population read newspapers online, compared to 51 per cent the year before.



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

Source: The Norwegian Media Barometer 2016, Statistics Norway.

Increase of streaming services

Linear TV viewing and radio listening have been decreasing for several years. However, the results from 2016 are at the same level as the year before: seven of ten watch TV, and six of ten listen to the radio, on a regular day. Not unexpectedly, older people use the linear services more than younger people. At the same time, the streaming of audiovisual content from the web is increasing, especially among young adolescents and young adults.

Almost four of ten (37 per cent) listen to audio media every day. In this group, seven of ten listen to files streamed from the Internet, for which listening via a mobile phone is common. Among the listeners aged 16-24 years, nine of ten use the mobile phone for audio files.

As for video media, a quarter of the population watch video content via online streaming services, DVD/Blu-ray or PVR on a daily basis. In this group, 70 per cent watch content from subscribed streaming services (SVOD), up from 65 per cent in 2015.

More subscribe to SVOD services than to print papers

Year by year, the share of the population with one or more print newspaper subscription in their household is declining. In 2016, 44 per cent of the population had a print subscription, down from 50 per cent the previous year. In just over ten years, subscriptions have decreased from around 70 per cent. Among 67-79-year-olds almost 80 per cent have a print subscription, compared to 15 per cent of 25-34-year-olds.

Fifteen per cent of Norwegians have an online newspaper subscription in the household, up from 12 per cent in 2015. At the same time, just over half the population (53 per cent) subscribe to online video streaming services (SVOD).

Read more in English:

The Norwegian Media Barometer 2016 (abstract in English) Summary of the results Basic tables

About the survey: The Norwegian Media Barometer survey provides data on people's access to and use of different media types and platforms. Media covered are newspapers, magazines & periodicals, books, sound media, video/film media, radio, TV, Internet, digital games and cinema. The survey is conducted through telephone interviews with a representative sample of the total population aged 9-79 years. The first Norwegian Media Barometer was conducted in 1991, and the report is published every year in the spring (open access).

Some results from the Swedish Media Barometer 2016

Media Use| Sweden May 2016 | KH

In Sweden, the use of media on the Internet is still increasing. For example, in 2016 we spent more time on social media as well as moving images on the Internet than 2015. However, despite the success of digital technology, traditional radio and television are still the biggest media platforms.



Nordicom-Sweden's Media Barometer is an annual survey that analyses daily media use on different platforms among Swedish inhabitants between 9 and 79 years of age.

Radio listening remained stable in 2016

The proportion of radio listeners decreased somewhat in the early 2000s, but the decline in listeners has stagnated in recent years. A total of 68 per cent listen to the radio on any platform on an average day, 9 per cent listen to web/podcasts. The reach is 15 per cent among those between 25 and 44 years.

More listen to music over the phone

Various formats of recorded music are studied in the Media Barometer. Despite the fragmented landscape, the proportion of music listeners remains stable. The share who use smartphones for listening to music increased from 20 per cent in 2015 to 30 per cent in 2016. Nearly 70 per cent of young people listen to music on a mobile on an average day.

Web TV is increasing

TV viewing has remained stable, but the platforms used to watch TV have changed. The Media Barometer 2016 shows that 81 per cent watch TV on any platform, 65 per cent watch scheduled programmes on traditional TV and 30 per cent watch TV online. Among young people, 55 per cent watch online TV on an average day and 45 per cent watch traditional TV. Although less TV is watched on traditional TV, mobile phones are not the obvious screen for TV. Six per cent watch online TV via a smartphone, 13 per cent among young people aged 15 to 24 years watch online TV on an average day.

Video clips – increasing slowly

Seventeen per cent watched video clips via smartphones on an average day in 2016. In 2015, the percentage was 15 per cent. The proportion is high among children, 39 per cent, and among young people, 43 per cent.

Fewer Swedes read newspapers on paper

About two thirds of the population read a newspaper on an average day. Forty-six per cent read a paper-based newspaper and 25 per cent read online. People aged between 24 and 44 years read newspapers online to a greater extent than other groups, most of which read via mobile phones at 25 per cent.

Special interest magazines are the most popular magazines

Women and men are equally involved in this type of magazine, each at 22 per cent. Weekly magazines, which have the oldest readers, have lost readers in recent years. Fourteen per cent read a weekly newspaper on an average day. In 2004, the share was 24 per cent.

Book on paper - stable among printed media

Thirty per cent read a paper-based book on an average day, but only 2 per cent read an e-book and 4 per cent share an audio book.

Social media continues to increase

Sixty-two per cent use social media on an average day. This is an increase of 10 percentage points from 2015. In particular, young people and young adults are frequent users. In the group aged 15 to 24 years, 94 per cent spend about 2 hours on social media on an average day.

More information and some basic tables (in English) Nordicom-Sweden's press release (in Swedish)

About the survey: Nordicom-Sweden's Media Barometer is an annual survey that analyses daily media use on different platforms among Swedish inhabitants between 9 and 79 years of age. Its purpose is to describe tendencies and changes in media use. The first survey was conducted in 1979. The survey is based on telephone interviews that are conducted across an entire year. Respondents are selected at random from the population. In 2016, 6,002 persons were interviewed. The main report is in Swedish, but some of the results are published in English online.

The Media Market

The media landscape in 20 European countries

Media Structure | Europe August 2017 | EH

The European Journalism Centre has published Media Landscapes, an online resource mapping the state of the media in 20 European countries. Among the Nordic countries, Finland, Norway and Sweden are represented.

Media Landscapes, previously a sub-section on the European Journalism Centre's site, now has its own, updated dedicated site. It features 20 expanded reports and additional facts, as well as comprehensive sourcing of all research. The site involves 26 expert writers who have mapped the journalism ecosystem of 20 countries. Each country features details on the historical evolution of its media scene and the major players, then and now. Print, broadcast and digital outlets are covered, as are the relevant associations, professional bodies, unions and educational institutions. Each report then places this in a socio-political context of regulation, legislation and press freedom.



Read more:

Media Landscapes. Expert Analyses of the State of the Media

About the European Journalism Centre: EJC is an independent, international, non-profit foundation dedicated to the highest standards in journalism, inter alia through the further training of journalists and media professionals.

Nordic telecom report: Mobile continues to increase

ICT | Nordic August 2017 | EH

In the Nordic countries, the data volume in the mobile networks is still growing strongly. High-speed broadband subscriptions are also increasingly popular, and all Nordic countries have more subscriptions per capita than the EU average. These are some of the findings in a report from the Nordic telecom authorities.



The annual report, compiled by the national regulatory authorities, describes telecom market trends in the Nordic and Baltic regions in 2010-2016. The comparisons below include the five Nordic countries only.

Nordic countries increasingly mobile – Finland at the top

Data traffic in mobile networks continues to increase. Finland is far ahead when it comes to the consumption of mobile data, using three times as

much data per capita and month as Sweden and Denmark in second place (16 and 5 G, respectively). Finland also has the highest number of mobile subscriptions per capita.

Broadband penetration is high in the Nordic countries, and access to both mobile and fixed broadband continues to increase. Finland has around 70 broadband subscriptions per 100 inhabitants (fixed plus mobile), placing it at the top of the list, closely followed by Denmark. When only mobile broadband is

considered, Finland is well ahead of the other countries. As for fixed broadband subscriptions, Denmark takes the lead with a penetration of over 40 per cent, while Finland comes last.

High-speed broadband in demand – especially in Sweden

When it comes to high-speed broadband (100 Mb), Sweden is well above its neighbours. High-speed subscriptions are, however, growing in all the Nordic countries, all of which rate higher than the EU average of number of subscriptions per capita. The demand for more broadband capacity can be linked to the increasing consumption of audiovisual content online.

IPTV largest in Iceland

The report also includes an overview of access to IPTV as well as cable and satellite television. IPTV penetration is highest in Iceland, where there is no cable TV. On average, 29 of 100 Icelandic inhabitants have an IPTV subscription, while the other Nordic countries have rates from 7 to 11 subscriptions per 100 inhabitants. Cable TV penetration is highest in Denmark, followed closely by Finland, while Norway has greater satellite penetration than the other Nordic countries.

The Nordic Telecommunications Market – report and database Links to national reports 2016 in the Nordic countries (PDF from Nordicom's table database)

Press releases from the national authorities, 22 June, 2017:

Finnish Communications Regulatory Authority: Use of mobile data still differs greatly between countries Nkom: Norske husstander har høyest andel bredbåndsabonnement

PTS: Fler snabba bredbandsabonnemang i Sverige jämfört med andra EU-länder

About the report: Telecommunication Markets in the Nordic and Baltic Countries 2016 includes data for the five Nordic countries and Estonia, Latvia and Lithuania. The report, published annually by the national telecom regulatory agencies, presents development trends for the separate countries through 2016. Find more data in the joint Nordic-Baltic database (established in 2007, including the Baltic states since 2013) or in the report (PDF) via the web portal.

The Swedish media output 2017

Media Content | Sweden June 2017 | MJL

In collaboration with the Swedish press and broadcasting authority, Nordicom is publishing the report Medieutveckling 2017 – Medieutbud [Media Development 2017 – Media Output]. The report is a new way of mapping the Swedish media output, focusing on news and fact content in the media over time.



An important part of monitoring the media development is studying how the media output appears and changes. This report examines the Swedish media output, focusing on the news and fact content in the media over time – on the radio, on television and in the daily press, both printed and digital.

Some conclusions:

 News- and fact-oriented output takes up more of the broadcasting time on SVT (public service television) than on TV4 (commercial television). More than half of the content on the four SVT channels included in the study consists of news and facts; on TV4 they account for approximately one-third.

- Comparisons between the different media types show that all of them have more comprehensive material online than in its original form this applies particularly to the evening newspapers, which provide almost five times as much material online than in the printed publication.
- Approximately one-third of the content in the daily press consists of material from TT (Sweden's
 national news agency), but the differences between the different kinds of newspapers are
 relatively large. The evening newspapers use less, and the rural newspapers use more.
- One important result from the report shows that in general there is a distinctive difference between the medium's original form and its online publication when it comes to the proportions of socially relevant information. The amount of socially relevant information is larger in the medium's original form than in the online version.

Download and read the full report (in Swedish)

Previous reports about media output from the Swedish Press and Broadcasting Authority (in Swedish)

The report series "Media development" is part of the Swedish Press and Broadcasting Authority's mission to monitor the media development in Sweden. The series consists of three reports that investigate media output, media consumption and media economy (all produced in collaboration with Nordicom) and an annual report about media politics. The series of reports replaces the former annual reports about the media development in Sweden.

Report maps business models of Nordic local and city newspapers

Newspapers | Nordic June 2017 | MJ

A report published by the Communication Research Centre CRC at the University of Helsinki explores the business models of local and city newspapers in Scandinavia. The report, written in Finnish, is based on a description and comparison of cases in Sweden, Norway and Denmark.



The data consist of pre-existing material such as media companies' financial reports from 2007-2015, and also include a qualitative data set of interviews with key persons in Scandinavia, conducted in 2016. From Sweden, Mittmedia and NTM Group are included; from Norway, Amedia and Sunnmørsposten; and from Denmark, North Media and Jysk Fynske Medier.

It was found that the Nordic business models in local and city newspapers, particularly in Norway and Sweden, are very similar to each other, even if no single

model exists. Platformization, transformations of audiences, and the end of the broadcast paradigm pose new challenges.

Some policy recommendations were also drawn from the interviews. Among other things, geographical personalization of news and feedback loop, in which new models are initially tested in one part of the company only, as well as the organization of events to help readers become committed to the newspapers, are recommended as future means of improvement.

Download the report: Paikallis- ja kaupunkilehtien uudet liiketoimintamallit Pohjoismaissa (PDF) Read more: The Communication Research Centre CRC at the University of Helsinki

The study is conducted within the research project The New Business Models of News Media in the Nordic Countries, funded by the Finnish Newspapers Association and the Media Industry Research Foundation of Finland.

Growth in digital subscriptions in Norway

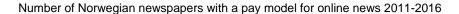
Newspapers | Norway June 2017 | EH

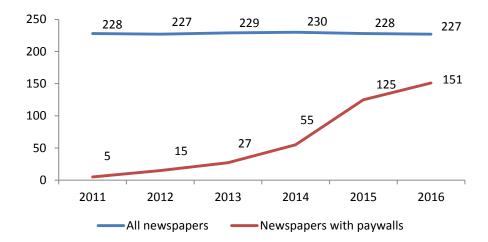
In Norway, the number of newspapers with paywalls for online content continues to increase. The number of digital newspaper subscriptions is also growing. This has resulted in a slow-down in the decreasing of circulations, according to a 2016 report on Norwegian newspapers (Avisåret, 2016).

In Norway, the drop in newspaper circulations slowed down considerably last year. Overall, circulations decreased by 1 per cent compared to a 5 per cent loss the year before. This means that a continuing drop in print sales (minus 8 per cent in 2016) was compensated by an increase in the sales of digital subscriptions. Standalone digital subscriptions account for 13 per cent of total circulation, an increase from 7 per cent in 2015. However, the most widely used subscription model includes a combination of printed newspapers and access to digital services.

A majority of newspapers have paywalls

Payment models for the online content of newspapers was introduced in 2011. A breakthrough came in 2015 when the number of newspapers with pay models for online news more than doubled—from 55 to 125 newspapers. Since then, growth has continued, and by the end of last year 151 newspapers were charging for online news. The most common pay model is a hard paywall: a restrictive approach whereby self-produced news is available to subscribers only.





Source: Høst, Sigurd 'Avisåret 2016'.

Norway's three major newspaper groups – Schibsted, Amedia, and Polaris Media – have actively contributed to the growth of paywalls. For example, the sharp increase in 2015 of paywalls is mostly explained by Amedia introducing a digital strategy for the group's newspapers. Among Amedia's more than 60 paid-for newspapers, nearly all have switched to the new pay model. As for newspapers with no paywalls for online content, they are mostly local non-dailies. Only seven of 71 daily newspapers offered their total online content for free by the end of 2016.

Download: Avisåret 2016 via Volda University College | Avisåret 2016 in PDF-format (in Norwegian)

About the report: The report is 22nd in an annual series on Norwegian newspapers and covers all Norwegian newspapers. The report series documents and analyses newspaper trends such as newspaper circulation, frequency of issues, pricing, ownership, digital payments, and so on. Author Sigurd Høst holds the position of Adjunct Professor at Volda University College.

Huge loss in ad revenues for Norwegian newspapers

Newspapers | Norway June 2017 | EH

Last year, the newspapers in Norway lost well over 100 million euro in advertising revenue (over one billion NOK). For the first time, revenue from digital advertising also declined. This is according to a report by the Norwegian Media Authority on the newspaper economy in 2016.

Despite cutbacks by more than 80 million euro last year, the Norwegian newspaper industry saw profitability decrease, compared to 2015. As for total operating revenue, there was a decrease by more than 100 million euro (950 million NOK).

Almost all papers lose advertising revenue

Over the past five years, Norwegian newspaper publishers lost 35 per cent of their advertising revenue. Previously, this development mainly struck the largest newspapers; now, almost all newspapers are hit, including smaller ones. Up to 2016, the drop in adverting revenue has concerned only print newspapers. To some extent the loss was compensated by growth in digital revenue, but in 2016 this came to an end when digital advertising declined as well.

Higher newspaper prices

On the other hand, revenue from newspaper sales increased slightly from 2015 to 2016. Over the last few years (2012 to 2016), operating income has remained rather stable, while circulations have fallen by almost 13 per cent. This means that newspapers have compensated for a drop in circulation with increased prices.

Reader payment increasingly important

In 2015, income from advertising was smaller than newspaper sales for the very first time. In 2016, advertising revenue share decreased further from 47 per cent to 42 per cent. Thus, the sharp decline in advertising revenue underlines an increasing dependency on readers paying for content.

At the same time, the number of Norwegian newspapers with pay models for news on digital platforms continues to increase. Additionally, there have been many positive indications about the willingness to pay for digital content.

For example, a 2016 report on Norwegian newspapers (Avisåret 2016) points to an increasing number of digital subscriptions. Reuters Institute's Digital News Report shows that Norway is the country with the most widespread access to digital news subscriptions.

Read more and download the report from the Norwegian Media Authority's website (in Norwegian)

About the report: "Økonomien i avishusa" [The Economy for Norwegian Newspapers] is the first report in the Norwegian Media Authority's annual reporting on the media industry's economic development, with a focus on news and current affairs media. A second report on the economy of local broadcasting 2012-2016 was published in July, and the entire report will follow in October. Data are primarily based on the Authority's own data collections, plus Norwegian media companies' official annual accounts and reports. The reports are published in Norwegian.

More reading:

Digital News Report 2017: Norway from the Reuters Institute for Journalism Research Pay walls strengthened local newspapers' ad potential, by BI:CCI (presentation in English) Ad Wars. Digital Challenges for Ad-Financed News Media in the Nordic Countries (Nordicom)

Media policy

European Media Policy Newsletter, no. 2, 2017

Media Policy | Europe August 2017



The European Media Policy newsletter from Nordicom provides an update on policy developments at the European level. It concentrates on news from the EU – current issues and trends in media policy, new proposals for legislation, debates in the European Parliament, recently taken or impending policy decisions and reactions among those concerned, EU studies in the field, etc.

The latest issue (August) gives an overview of policy developments regarding the media in general, freedom of expression/media pluralism, hate speech, audiovisual, online platforms/social media, privacy/data protection and artificial intelligence/robotics.

Read the whole newsletter no. 2, 2017 (PDF) Read previous issues and/or subscribe (free service)

Denmark: Timetable for a new media agreement

Media Policy | Denmark April-May 2017 | EH

The Danish Government has set a timetable for the next media policy agreement. Starting in May, citizens, the industry and politicians will be invited to discuss future media content, production and distribution. A new agreement is expected to enter into force at the turn of 2018/2019.

In Denmark the framework for media policy is established in political media agreements, which run for four years. They are based on agreements between the government and one or more parties in the Folketing (Parliament). The current media agreement is for the period 2015 to 2018.

The Danish Government, with Minister of Culture Mette Bock in the lead, has presented the schedule for the next media agreement. In May-September, there will be public meetings and an online forum, to which citizens are invited in order to express their opinions about which media content and distribution platforms are important for the future. Then, from September to November, it is the industry's and the politicians' turn. In focus will be questions about who can produce and distribute domestic content, and to what extent domestic content will require public support.

In early 2018, the government will present its proposal for a new media agreement, and the political negotiations can begin. The new agreement is expected to enter into force at the turn of 2018/2019.

The Ministry of Culture's press release from April 7, 2017 (in Danish) Find the media policy agreements at the Ministry's website (in Danish)

About the media agreement and public service: In November 2016, the Public Service Committee presented a report including five future scenarios for public service media, which also contributes to the groundwork for the preparation of the next political media agreement.

Finland: Reports review Yle's online local news

Media Policy | Finland June 2017 | MJ

Public service companies' news online cannot be proven to have any harmful effect on the commercial media market. This conclusion can be found in a Finnish report on a review of Yle's regional online news activities in relation to the newspaper market. The authors' conclusion is based on a number of Nordic studies on the possible impact of public service content.

In spring 2017, Yle's Administrative Council received two reports reviewing the company's local and regional news content online. Both reports were prepared by researchers at the Comet Research Centre at the University of Tampere in Finland.

The reports serve as the factual basis for an ongoing discussion of Yle's role, and more specifically for a public value test of Yle's digital news services (link in Finnish) performed in the spring, following a request from the Finnish media industry organisation.



Public service regional news and the newspaper market. The first report reviews Yle's regional news offering online, and tries to assess its possible impact on the newspaper market. It is based on analysis of a number of studies on public service content online and its possible impact on the commercial market. The arguments asserted in the examination request are then examined in light of the latest available research results.

Examples of studies included are national media investigations in Denmark, Finland, Norway, Sweden and Great Britain (PDF) from 2015-2016, in which the

authors find no evidence of clear impact on the commercial market. The authors also find it difficult to build a research design that can prove the effects of public service operations on the media market.

About Yle's online news in Swedish. Yle (Swedish Yle) regularly produces news for Swedish-speaking Finns in five local editions, each with its own front page. The second report describes the use of these services in 2016 and 2017. It shows that the number of page views of Yle's local news content in Swedish was comparatively low, totalling 2-8 per cent of all page views on the Swedish Yle website. The number of page views is also low in comparison with Finland's commercial Swedish-language news media. However, the number of unique visits (web browsers) is increasing.

Read the reports (in Finnish):

On Yle's regional news and newspaper market: Yleisradion alueellisten verkkouutisten vaikutus sanomalehtien verkkopalveluiden markkinoihin

On Yle's Swedish-language online news: Selvitys Yleiosradion ruotsinkielisten alueuutissivujen sivunäyttö ja verkkoselainmääristä

More about current media investigations in Finland: In recent years, Yle's role and funding, as well as the conditions for national media companies on the Finnish media market, have been the subject of several investigations and policy proposals.

The Swedish public service inquiry: part 2

Media Policy | Sweden June 2017 | UF

The Swedish Government has assigned a parliamentary committee to overhaul the terms for public service broadcasters, who will face a new license period from January 2020. This is a supplementary directive to an inquiry launched in autumn 2016.

Before the new license period for the Swedish public service radio and TV broadcasters (SR, SVT and UR), there will be an overhaul of the terms for the companies. A license period usually lasts six years; the next period will begin on January 1, 2020.

Assessing the public service financing model

In autumn 2016 the parliamentary committee was assigned a first task, which was to assess alternative systems of financing as the current household license fee is not considered a sustainable model for the future. This investigation is to be published by November 17, 2017.

Public service in the digital environment

In June of this year, the committee's task was broadened. It is to look into several areas, including minority programming and regional production, but its main focus is to be on the public service companies' activities in an increasingly digital media environment. The committee is to consider how the public service companies should reach as many citizens as possible, including via digital platforms. Furthermore, it is to assess the public service companies' collaborations with commercial companies and their relationships with global digital actors and distributors.

The next public service license period will begin on January 1, 2020. The committee is to publish this second report on June 29, 2018.

The supplementary directive (Dir. 2017:73) (in Swedish)

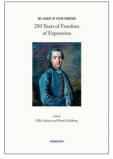
Information on the parliamentary committee on public service broadcasting and its work (in Swedish) More news on media policy in Sweden (in English)

Freedom of Expression and Media Plurality

The Legacy of Peter Forsskål. 250 Years of Freedom of Expression

Freedom of Expression | Publication from Nordicom | Nordic August 2017

New book addresses 250 years of freedom of expression in Sweden. Last year Sweden's Freedom of the Press Act, the first legislation of its kind in the world, celebrated 250 years. The newly released book, 'The Legacy of Peter Forsskål. 250 Years of Freedom of Expression', sheds light on the history of free speech based on Peter Forsskål and his 21 theses on civil liberty.



Sweden and Finland, which then were one country, were the first in the world to pass a law on press freedom. But a few years before the new law was adopted, Peter Forsskål published a pamphlet that contained innovative ideas for that time, including every citizens' right to freedom of expression.

Forsskål's pamphlet was called 'Thoughts on Civil Liberty' and came to cause big commotion in the 1760s Sweden. It included 21 paragraphs setting out his thoughts advocating against oppression and tyranny and expressing civil rights for everyone,

says Ulla Carlsson, one of the book's editors and UNESCO Chair on Freedom of Expression at the University of Gothenburg.

'The Legacy of Peter Forsskål. 250 Years of Freedom of Expression' contains chapters from a number of researchers and writers from both Sweden and Finland. The authors shed new light on Forsskål's life and historical battle for Swedish press freedom as well as development of freedom of the press until today. Thus, the book is both a historical look back and a highly topical work in today's digital society.

The book is based on a seminar that took place on UNESCO's World Press Freedom Day in Helsinki, 3 May 2016, an event held in association with the 250th anniversary of Sweden's Freedom of the Press Act.

Anniversaries like these can be used as a starting point for debate. It's important to discuss our history and where we stand today in terms of freedom of expression, the right to information and freedom of the press, and that's what we want to do in this book, says Ulla Carlsson.

Read more, order or download the publication (open access).

The editors: Ulla Carlsson is Professor and UNESCO Chair on Freedom of Expression, Media Development and Global Policy at the Department of Journalism, Media and Communication, University of Gothenburg. She is the former Director of Nordicom. David Goldberg is the Founder and Director of Project Peter Forsskål

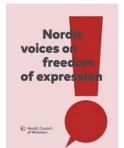
More Nordicom Publications on Freedom of Expression (open access):

- The Assault on Journalism. Building Knowledge to Protect Freedom of Expression (2017)
- Freedom of Expression and Media in Transition. Studies and Reflections in the Digital Age (2016)
- Freedom of Expression Revisited. Citizenship and Journalism in the Digital Era (2013)
- Freedom of Speech Abridged? Cultural, Legal and Philosophical Challenges (2009)

Nordic voices on freedom of expression

Freedom of Expression | Nordic April 2017 | EH

A new booklet highlights the challenges to freedom of expression, from a Nordic perspective. It is produced by the Nordic Journalist Centre for the Nordic Council of Ministers, and available as open access.



The booklet *Nordic Voices on Freedom of Expression* contains abstracts of 14 articles written by both female and male debaters, journalists, writers, and academics. They speak about freedom of expression as seen from their Nordic perspective – whether they are from Denmark, Faroe Islands, Finland, Greenland, Iceland, Norway, Sweden, or Åland.

Nordic voices on freedom of expression is a snapshot of the debate book *Den* svåre yttrandefriheten – nordiska röster. The full-length articles, in Scandinavian

languages, are available online at NJC's website.

Download Nordic Voices on Freedom of Expression from the Nordic Council of Ministers' common publication portal Nordpub.

The editors: Per Lundgren (Senior Advisor, Nordic Council of Ministers), Mogens Blicher Bjerregård (President, European Federation of Journalists) and Ole Rode Jensen (Nordic Journalist Centre).

Online hate speech legislation in the Nordic countries

Freedom of Expression, Gender Equality | Nordic June 2017 | MJL

Online hate speech targets both women and men. However, men are more likely to fall victim to attacks involving threats of violence and references to their profession and competence, whereas women are more likely to experience sexist and sexually charged offences. Still, the legal protection for victims of gender-based hate speech is non-existent. This is shown in a report carried out by Nordic Information on Gender (NIKK).



The rampant online posting of aggressive and sexist remarks poses a serious democracy problem and the question of how it can be stopped is more urgent than ever in the Nordic countries. The Nordic Information on Gender (NIKK), at request of the Nordic Council of Ministers, is now presenting a report mapping the legal regulation of online hate speech in the Nordic countries.

The report is written by Moa Bladini, senior lecturer in criminal law at the University of Gothenburg, and shows that online hate speech targets women and men to similar extents. However, there are important differences in the

types of violations women and men experience. Men are more likely to fall victim to attacks involving threats of violence in references to their profession and competence, whereas women are more likely to experience sexist and sexually charged offences that are of more personal than occupational nature.

"Gender" not included in hate crime legislation

The study shows that the hate crime legislation is similar across the Nordic region. Hate speech targeting certain defined groups is illegal in all Nordic countries. However, gender falls outside the realm of legal protection in all Nordic countries. Consequently, the legal protection for victims of gender-based hate speech is non-existent.

According to Moa Bladini, there is good reason to include victims of gender-based offences in the hate crime legislation. "In view of the fact that women are particularly affected by gender-based online hate speech and that the Nordic countries see gender equality as important, it is surprising that no Nordic country offers people legal protection against such violations".

Strong protection for freedom of expression

There is troubling uncertainty in the Nordic countries regarding how the hate crimes legislation should be applied and where to draw the line between hate speech and freedom of expression, and consequently the legal provisions are not used nearly as often as theoretically possible.

"There is a very strong protection for formal freedom of expression in the Nordic countries. Ultimately, however, this leads to some voices actually being silenced - and become a real restriction on their freedom of expression. We often operate with an overly simplified picture of free speech", says Moa Bladini.

Read more on NIKK's website (in English) and download the report (summary in English) Nordic Council of Minister's press release 2017-06-21: Women have poorer legal protection than men from online hate

About NIKK, Nordic Information on Gender: NIKK is a Nordic co-operative body under the Nordic Council of Ministers. NIKK gathers and disseminates research, policy, knowledge and practice in the area of gender equality in a Nordic and cross-sectoral perspective. .Read more about NIKK.

Other current Nordic reports on gender and media



Regulation of Gender – Discriminatory Advertising in the Nordic Countries examines how gender-discriminatory advertising is regulated in the Nordic countries. Download via Nordpub



Women and men in the news: Report on gender representation in Nordic news content and the Nordic media industry

Read more on Nordicom's website (including links to more reports and sources)
Download via: Nordic Council of Ministers' website or Nordpub

About the Nordic Council of Ministers for Gender Equality and the Nordic Cooperation on Gender Equality.

Media Pluralism Monitor Report 2016

Media Pluralism | Nordics Europe June 2017 | EH

The Media Pluralism Monitor has examined 30 European countries and finds that none of them is free from risks for media pluralism. The three Nordic countries in the survey – Denmark, Finland and Sweden – are reported as low-risk countries, but with warning signs due to a concentration in media ownership.

The Media Pluralism Monitor, conducted by the Centre for Media Pluralism and Media Freedom (CMPF), is a tool designed to assess media pluralism in the EU member states. It examines the risks for media pluralism in four thematic areas: basic protection, market plurality, political independence, and social inclusiveness. The results are based on 20 indicators, five per each area.

Generally low risks in the Nordic region

In the Nordic countries there is generally good ground for media pluralism. In e.g. the area of basic protection – including freedom of expression, the right to information, the status of journalists, etc. – they all show low risks, in line with most of the EU countries.

MPM 2016: The Nordic countries' scores for risks for media pluralism (%)

	Denmark	Finland	Sweden
Basic protection	13	17	13
Market plurality	39	61	50
Political independence	18	44	7
Social inclusiveness	22	43	19



Denmark and Sweden also show good results for political independence, with indicators such as editorial autonomy and independence of public service media; and for social inclusiveness, which measures media literacy and access to media by various social and cultural groups.

Finland, on the other hand, shows medium risks, which is mostly related to a lack of regulation. Here, the report suggests, e.g., that the relationship between the public service company Yle and the state should be formulated more explicitly (political independence) and that support to local and minority media should be expanded (social inclusiveness).

Small and highly concentrated Nordic markets

The largest risk for media pluralism in the Nordic countries is linked to market plurality. Denmark, Finland and Sweden have a high concentration of media ownership, mostly explained by their being relatively small media markets. Also in the EU as a whole, the highest risks are related to market plurality; the media ownership concentration being the only indicator for which all countries score medium or high risks. Commercial and owner influence over editorial content is also a matter of concern for many EU countries, and for the two EU candidates under consideration.

The 2016 results at CMPF's website

Country reports: Denmark | Finland | Sweden

About the method: The CMPF cooperates with national researchers to carry out the data collection and to author the reports, which are reviewed by CMPF staff. Moreover, to ensure accurate and reliable findings, a group of national experts in each country review the answers to particularly evaluative questions. For more information on the methodology and the national researchers and experts involved, see each country report. Read more about CMPF.

UNESCO Study: Protecting Journalism Sources in the Digital Age

Freedom of Expression | Global June 2017 | MJL

'Protecting Journalism Sources in the Digital Age' is the name of a new global study produced by WAN-IFRA for UNESCO. It examines the risks and challenges confronting the safety and privacy of journalistic sources in the new digital environment.



This new UNESCO-study examines the growing risks confronting forms of journalism dependent upon confidential sources and whistleblowers. The research seeks to assess the evolution of protective legal frameworks that support protection of journalistic sources and provides recommendations for the future of journalistic source protection.

The study finds that the legal frameworks that support protection of journalistic sources are under significant strain. This represents a direct challenge to the established universal human rights of freedom of expression and privacy, and

one that especially constitutes a threat to the sustainability of investigative journalism.

Read more and download the report here: UNESCO | WAN-IFRA

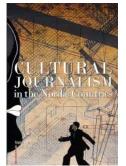
About the report: This is the ninth edition in the UNESCO Internet Freedom Series, and covers 121 UNESCO Member States during the period 2007-2015. UNESCO series of publications on Internet Freedom aims to explore the changing legal and policy issues of Internet and provide its Member States and other stakeholders with policy recommendations aiming to foster a conducive environment to freedom of expression on the net. See previous titles in UNESCO Series on Internet Freedom.

An attack on one is an attack on all: In June, UNESCO published a report on the issue of safety of journalists. The report, named *An attack on one is an attack on all*, looks at the innovative, successful ways in which media companies, individual journalists and civil society organisations are coming together to improve journalists' safety and end impunity. Read more and download the report

More Publications from Nordicom, Open Access

Cultural Journalism in the Nordic Countries

Research Anthology | Nordic May 2017



In an era when culture itself has become central to political debates, when boundaries between hard news and soft news, facts and opinion are dissolving, cultural journalism contributes to democratic discourse on vital issues of our time. Cultural journalism is furthermore indicative of journalistic autonomy and specialisation within media organisations, and of the intertwined relationship between the cultural and political public spheres.

Nordic cultural journalism in the mainstream media covers more subjects today than ever before, from fine arts to gaming, media industries, and lifestyle issues.

At the same time, it harbours debates and reflection on freedom of expression, ethnicity and national identity. This book contributes to an emerging international research agenda on cultural journalism at a time when digitalisation, convergence and globalisation are influencing the character of journalism in multiple ways. Editors are Nete Nørgaard Kristensen and Kristina Riegert.

Read more, order or download the publication (open access).

Nordicom Review Special Issue 1/2017

Theme: Being Old in the Age of Mediatization



This special issue of *Nordicom Review* examines media dynamics in the lives of older people and how these dynamics influence the perceptions of old age, ageing and older people. From a number of different perspectives, the articles in the issue present studies of the specific consequences media have on the later part of the life cycle and how old age and ageing is affected and shaped by processes of mediatization.

This issue concentrates on the question of how media influence our older generations and thus discusses how a mediatized society may contribute to confirming or

altering conceptions of what it means to be old. Editors are Christa Lykke Christensen and Line Nybro Petersen.

Read more, order the publication or download the articles (open access).

Read Nordicom Review's latest articles, published as online-first.

Nordicom-Information 1/2017

Media Research in Society - the Relationship Between Academy and Industry



This issue of *Nordicom-Information* deals with the relationship between media research and society. The third assignment of the university is addressed by more than 30 contributors. This issue includes information and experiences regarding new platforms, working methods and research projects in the Nordic countries. In which ways do Nordic researchers in media and communication contribute to the public debate in social media? What is the value of humanities research today? How has the idea of open science developed in the Nordic countries? Editors are Maarit Jaakkola and Ragnhild Mølster.

Read more, order the publication or download the articles (in English or Scandinavian).

More reading: Nordicom has asked four Nordic media professors what should be done to improve the impact of research in media and communication beyond academia. Read their answers here.

Research Articles, Open Access

Global journalism research collected on one site

Research Articles | Finland Global July 2017 | MJ

Can all global journalism research be captured on one site? The Journalism Research News Project mines the Internet for news about recent international research, and collects it in one place. Launched in 2015 in Finland, it has presented almost 1,500 articles so far.



The Journalism Research News service collects about 80 new research articles every month from a number of scientific journals. Besides news, trend reviews, and CFPs, the website offers internally produced videos and

academic job opportunities within the monitored field of journalism studies.

The JRN project started at the University of Jyväskylä in Finland in 2014 in order to aggregate European journalism research in one place. Initially, the aim of the portal was to make European journalism research more visible as a counterweight to the dominance of American research. Another reason was that the results from American studies could seldom be directly transferred to European, not to mention Nordic, conditions. Between 2015 and 2017 the service was extended to cover North America, Australia, and New Zealand. When Asia, Africa, and South America are included at the end of the year, the portal will cover almost all the journalism research that is conducted in the world.

Since 2014 the project has been financed primarily by the Helsingin Sanomat Foundation. When that financing ends at the end of 2017, the plan is to make JRN part of the newly launched Centre for Open Knowledge at the University of Jyväskylä.

Visit Journalism Research News online

Read: the final report of the project 2015 | the final report of the continuing project 2017 (in Finnish)

New from the national research journals in the Nordic countries

Research Journals | Nordic June 2017 | MJL

In Denmark, Finland and Norway, the national research organizations in the media and communications field each stand behind a national research journal: *MedieKultur* in Denmark (in English), *Media & viestintä* in Finland (mainly in Finnish), and *Norsk medietidskrift* in Norway (abstracts in English), During summer, the journals have all released new issues.

Read more and find links to the latest issues (all titles are open access).

Media Trends in the Nordic Countries

Editor: Eva Harrie

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

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

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

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