

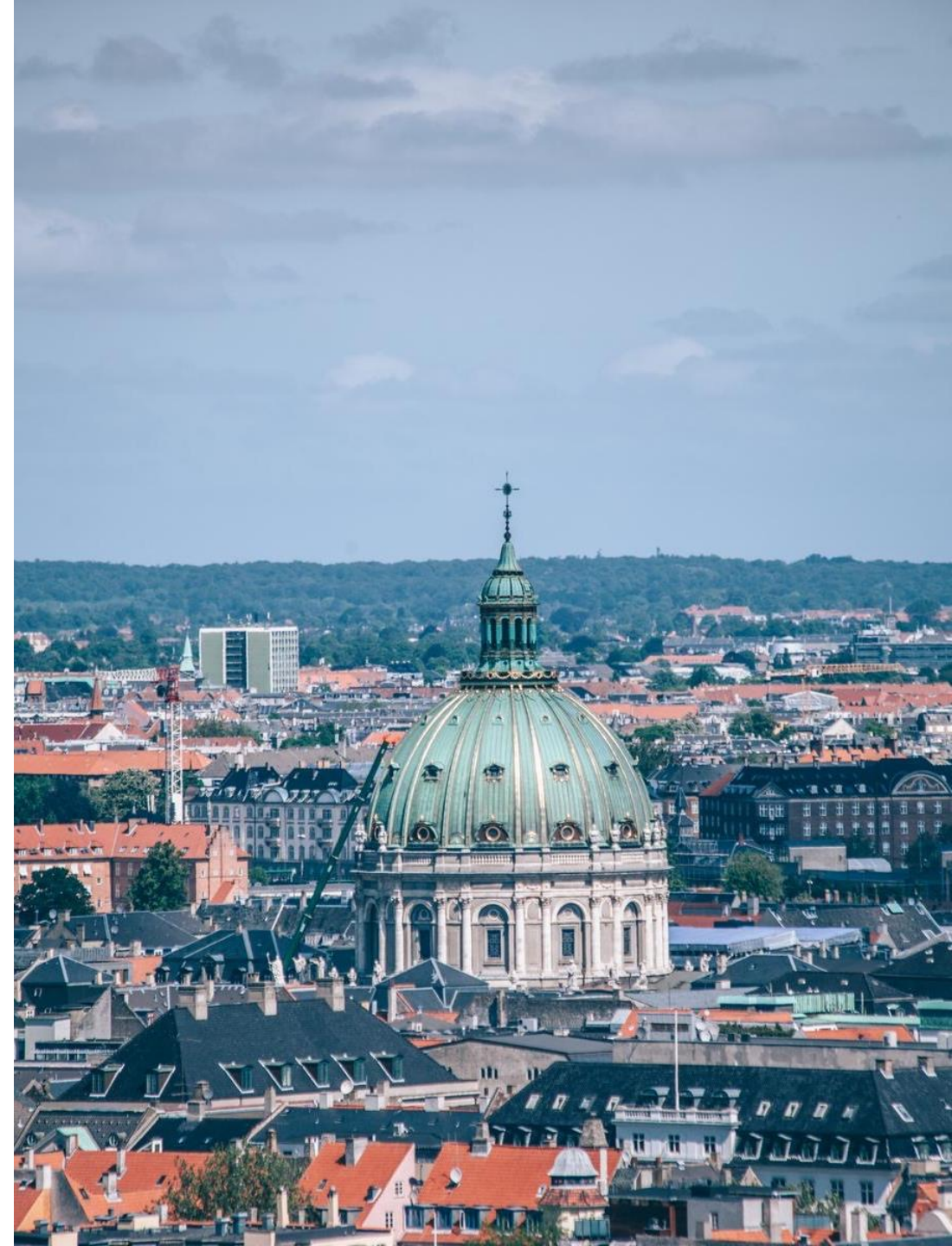
MEDIA LANDSCAPE IN DENMARK

INTRODUCTION AND DENMARK IN BRIEF

INTRODUCTION

This document is designed for airlines who are interested in promoting their routes out from Copenhagen. Based on data provided by the latest industry reports, this document is to provide airlines' marketing team with insights into media and advertising in Denmark.

If you have any specific questions, please email: woco@woco.dk



DENMARK IN BRIEF

- Population: 5.7 mio
- GDP annual growth rate: 1,5%
 - (2017) EU average: 1,6%
- Unemployment rate: 4,2%
- Population in the top 5 cities:
 - Copenhagen: 1.2 mio
 - Aarhus: 256K
 - Odense: 170K
 - Aalborg: 106K
 - Esbjerg: 71K
- Gross advertising expenditure: approximately 15 billion DKK
- Internet penetration: 96%

SOURCE: DANMARKS STATISTIK + REUTERS, DIGITAL NEWS REPORT 2017



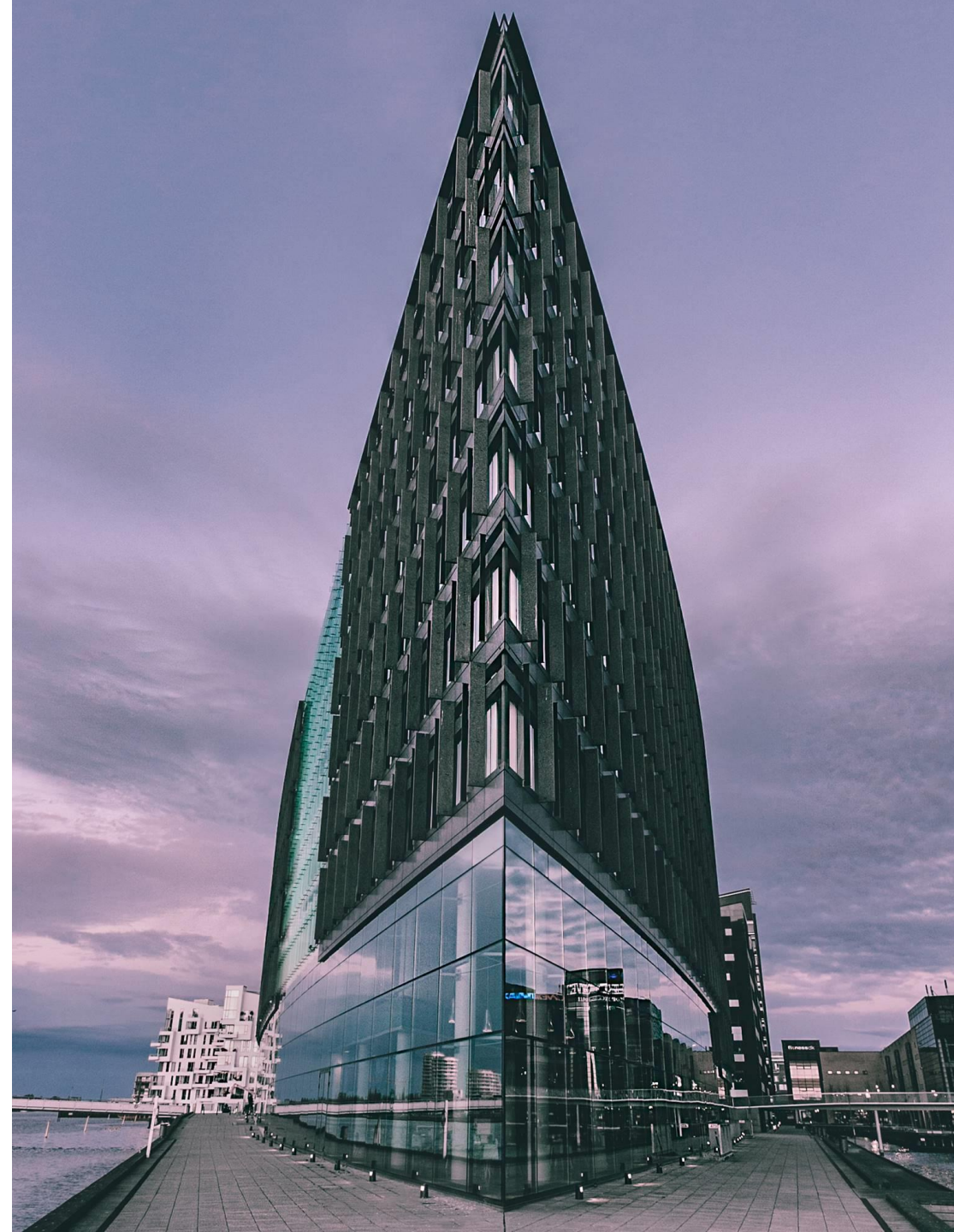
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1. THE DANISH MEDIA LANDSCAPE

MEDIA TENDENCIES

Traditional media is under massive pressure from foreign, global media giants. In Denmark, Google and Facebook own approximately 50% of all Danish media expenditure.

- More young people are choosing to watch and listen to the national and non-commercial broadcaster DR, rather than Netflix.
- 60% of the total media use is still spent on traditional media such as TV, radio and print.
- 2018 has been the "year of native advertising".
- Influencer marketing is rising – yet it is still quite chaotic and undocumented and pricing models are still not transparent.
- Podcasts are on the rise. 15% of the Danish population use podcasts on a weekly basis. Primarily young Danes.
- 9 out of 10 danes have smartphones, and for most it is the primary unit used for going online

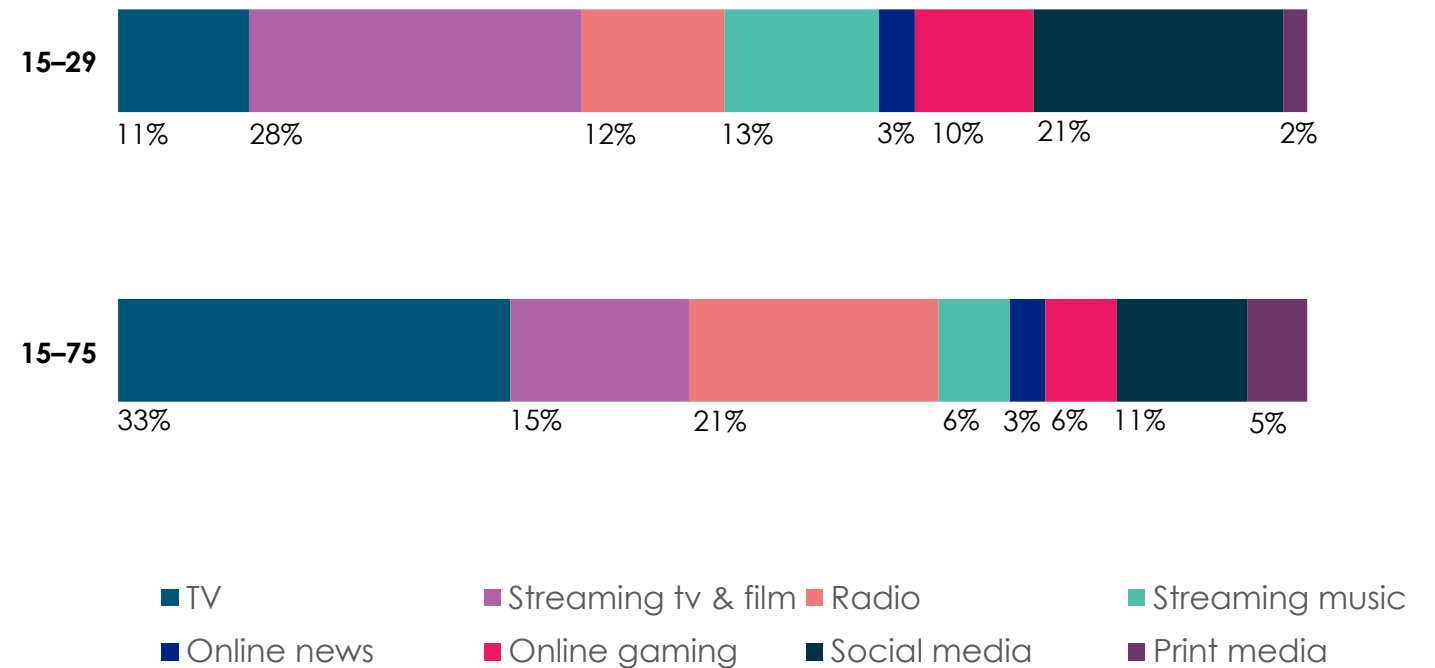
SOURCE: DR MEDIEUDVIKLINGEN 2017 & 2018



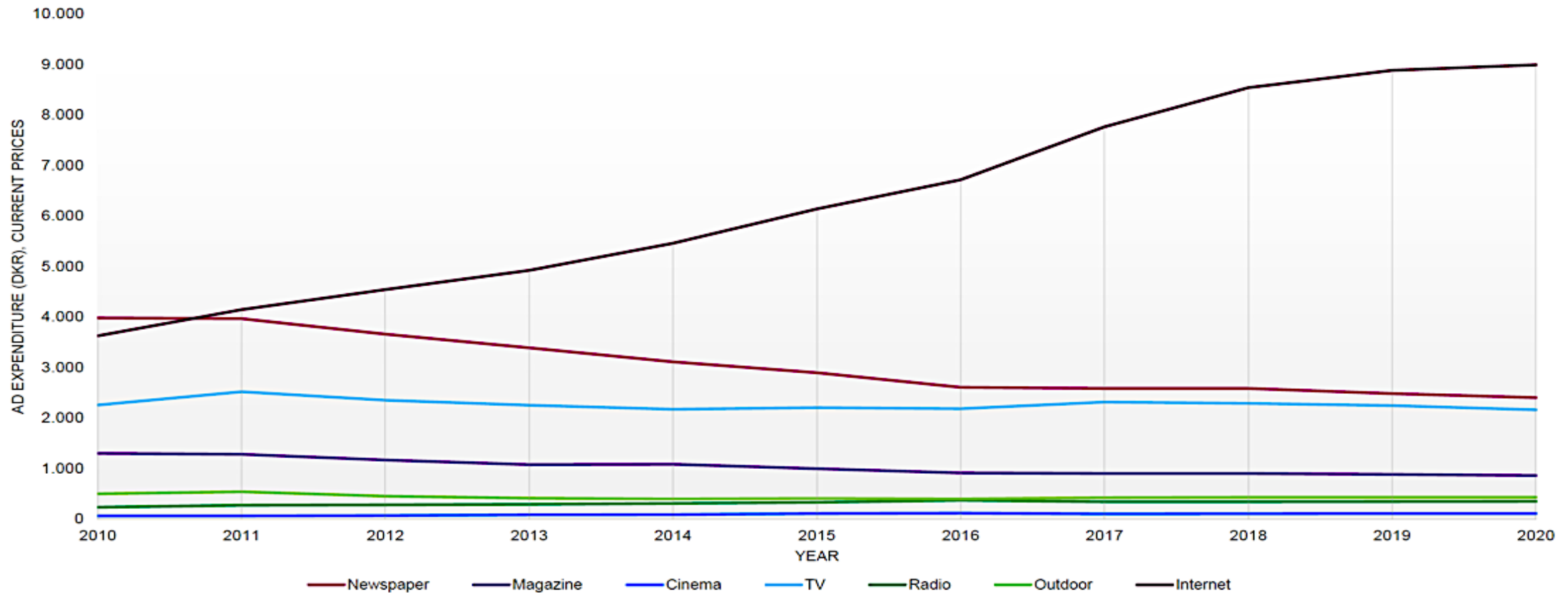
DANISH MEDIA USE

- On average, Danes spend 7 hours and 16 minutes every day on media.
- 3 out of 5 minutes are still spent on traditional media as TV, radio and print.
- 15–29 year olds spend a significantly higher amount of time streaming video and music.
- YouTube is in a league of its own in the younger demographic. It is estimated that the time spent on youtube matches the time spent on all other streaming platforms combined.

DISTRIBUTION OF DANISH MEDIA USE



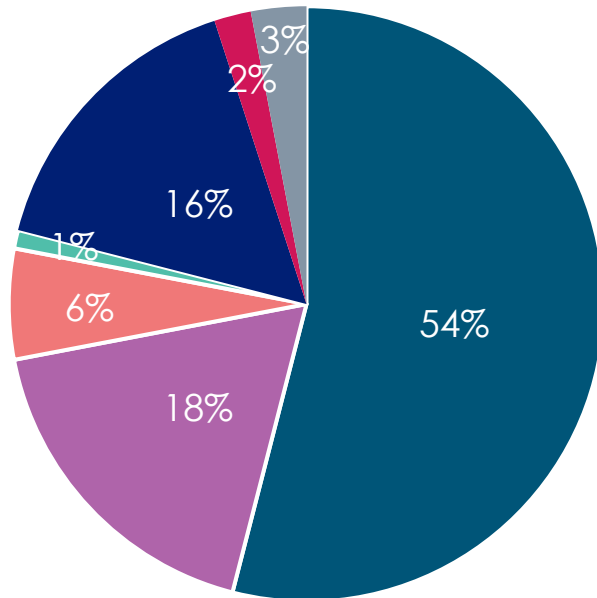
ADVERTISING EXPENDITURE



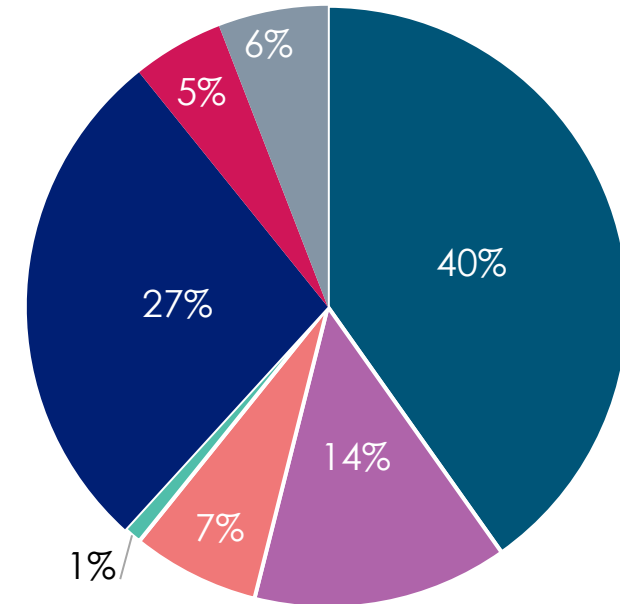
A slow but steady decline in ad spend is expected across all media groups - online being the only exception.

AD EXPENDITURE SPLIT

DENMARK



WESTERN EUROPE



The pie charts illustrate ad spend in Denmark compared to Western Europe. The main difference in radio and TV are caused by the strong position of DR - the national public service non-commercial broadcaster.

MEDIA INFLATION YOY

MEDIA	2013	2014	2015	2016	2017	2018
IN PRICE	%	%	%	%	%	%
TV	+3.0	+5.5	+5.0	+5.0	+5.5	+6.0
PRINT	+1.0	+1.5	+1.0	+0.5	+1.0	+1.0
OUTDOOR	+2.0	+1.7	+2.5	+2.5	+3.0	+3.0
RADIO	+8.0	+3.6	+3.5	+3.0	+3.5	+4.0
CINEMA	+3.0	+5.5	+4.0	+3.0	+3.3	+2.0
ONLINE	+3.0	+4.8	+4.0	+5.0	+4.5	+4.5

Media prices are expected to rise above the average inflation rate in Denmark.

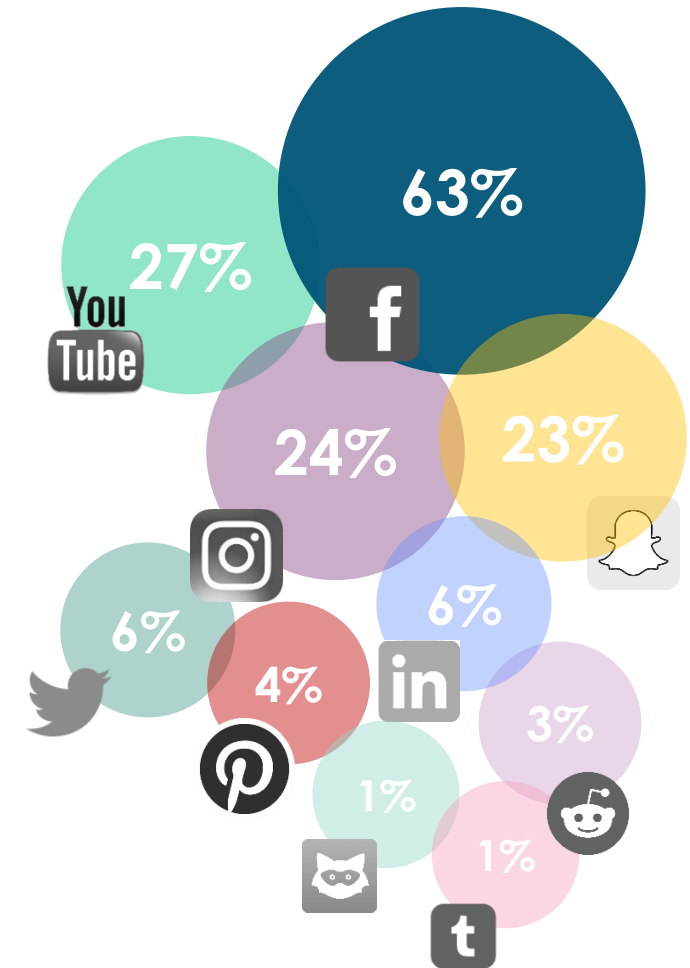
SOCIAL MEDIA WEEKLY CONSUMPTION

Though down 2% from 2017, Facebook is still the most used form of social media with 63% of all Danes using Facebook daily. However, YouTube and Instagram are showing a significant increase in daily usage.

In the young demographic (12–24 year olds) 81% used Facebook daily in 2017, in 2018 this number dropped to 73%.

Social Media	2017	2018	
Facebook	65%	63%	-2%
YouTube	24%	27%	+3%
Instagram	18%	24%	+6%
Snapchat	23%	23%	0%

Daily social media consumption: 12+



Daily social media consumption: 12+

SOCIAL MEDIA

YOUTUBE

YouTube is a standout in the social media landscape. In Denmark, 68% of the population uses YouTube on a monthly basis, 51% on a weekly. That is more than the streaming services HBO Nordic, TV 2 Play and Viaplay combined.

In average, danes daily watched 23 minutes of content on YouTube in 2018.

DAILY TIME SPENT ON YOUTUBE

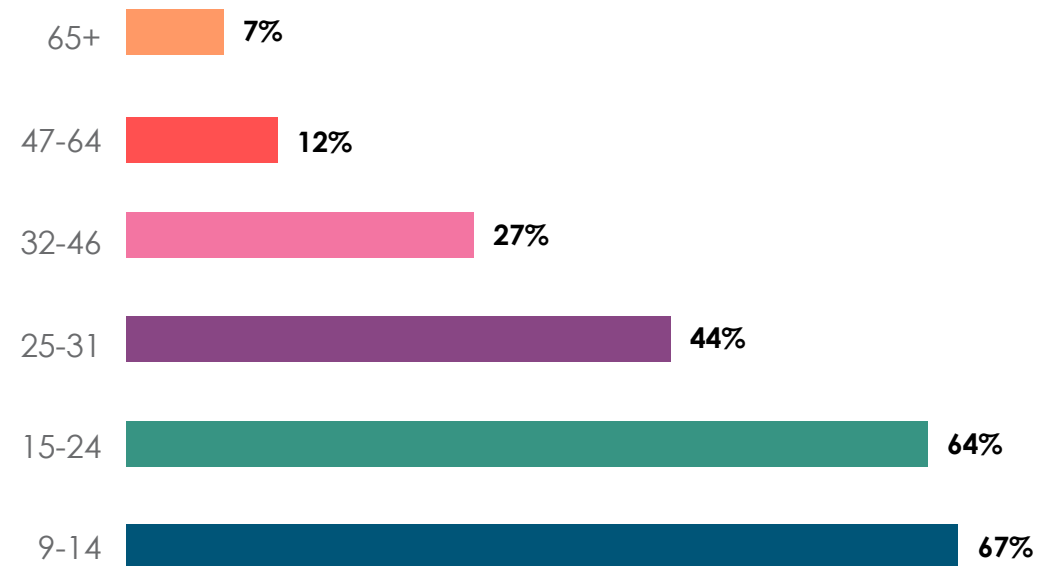


12 MIN
2014



23 MIN
2018

DAILY YOUTUBE USERS IN 2018

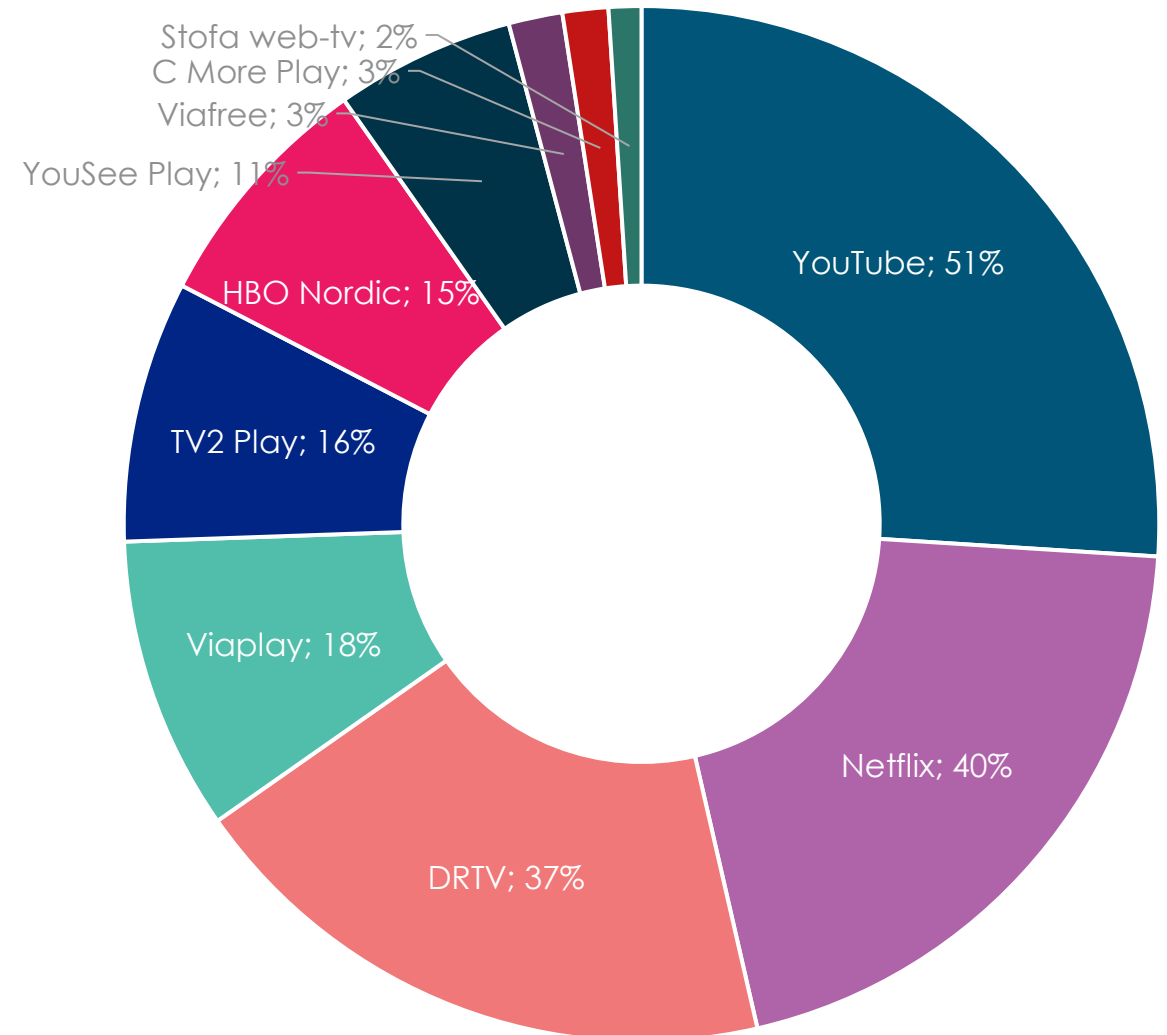


STREAMING & DOWNLOADING

- 48% of Danes stream films and TV series on a weekly basis, which increases to 83% within the 15-29 year old bracket.
- There is no official statement of the time spent across traditional TV and streaming including services such as Netflix and YouTube.
- Among the general population 74% will use traditional TV, while 26% will use streaming.
- Daily use of the US streaming service is estimated to be 20 minutes. 40% used Netflix at least once a week in 2018.

SOURCE: DR MEDIEUDVIKLINGEN 2018

TOP 10 STREAMING SERVICES - WEEKLY USERS



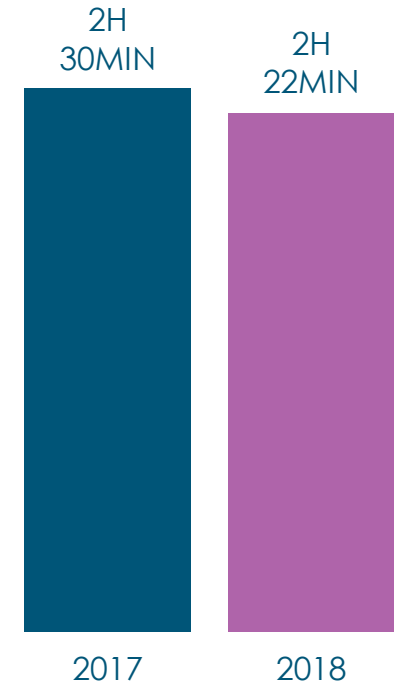
SOURCE: KANTAR GALLUP INDEX DANMARK, 12+

TV-SHARE OF VOICE (2018)

DR	TV2 CORP	NENT GROUP	DISCOVERY	OTHERS
36,6%	39,1%	10,3%	9,6%	4,5%



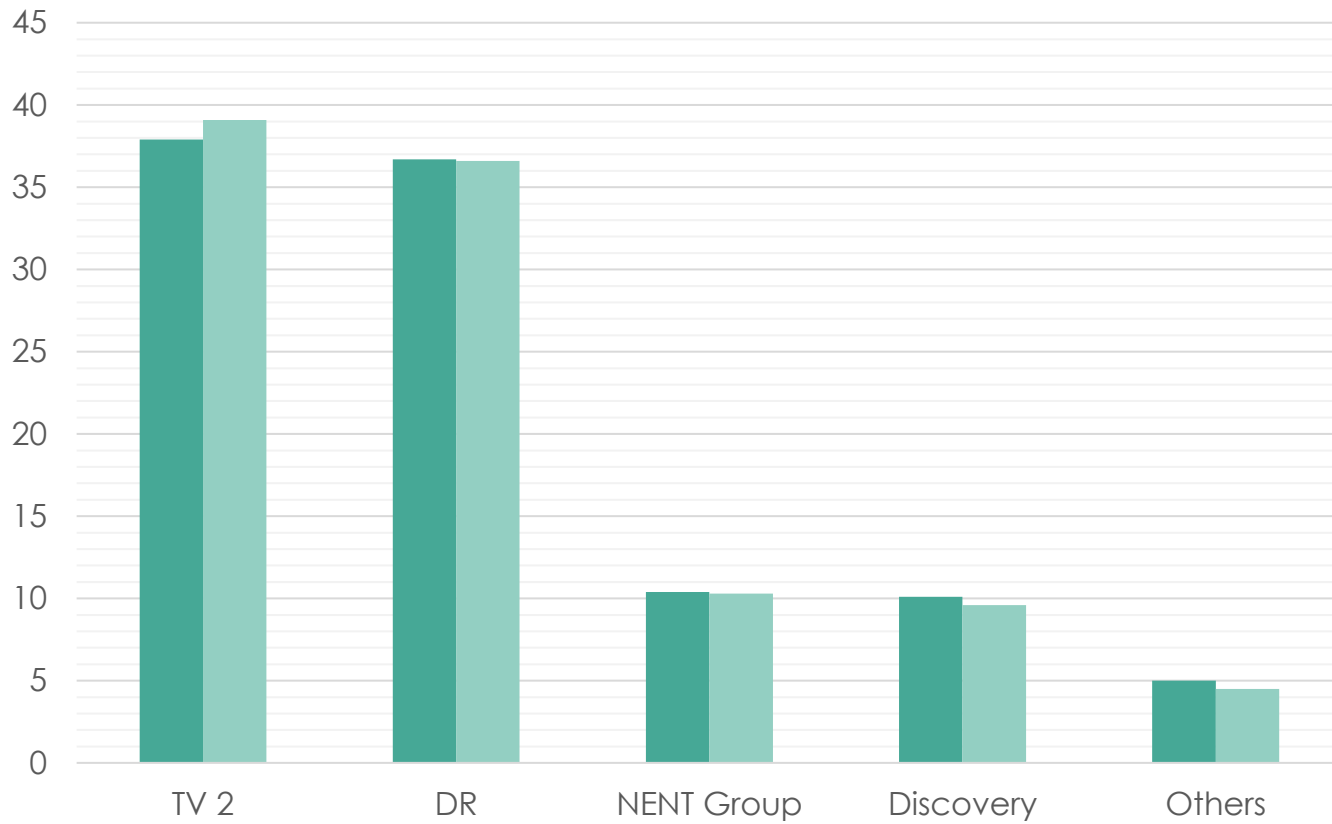
DAILY TIME SPENT ON TV



Two major broadcasters dominate Danish TV: DR (public service, non-commercial) and TV2 Corp (public service, commercial).

TV-TOTAL SHARE OF VOICE

■ 2017 ■ 2018



Two national broadcasters, DR and TV2, dominate Danish TV

SOURCE: KANTAR GALLUP SEER-UNDERSØGELSEN 2018
DATA: LIVE + VOSDAL + TS, 3+



THE RADIO MARKET

- 92% of Danes listens to the radio every week, with an average of 1 hour and 47 minutes per day, a 4 minute drop per day from 2017.
- The Danish radio market is quite unique, because public service radio has such a big share of the market. The two public service stations P3 and P4 are doing especially well. Nova FM is the largest commercial radio station.
- 18% of the population listens to podcasts every week. The younger generation (15–31 year olds) are front runners with 31% listening weekly, a 6% increase from 2017.
- **Market perspective:** Podcasts, content and creative strategy cases on radio is commonly requested from advertisers and have a high focus from the supply side.

SOURCE: DR MEDIEFORSKNING 2018



RADIO-COMMERCIAL

DANSK RADIO REKLAME

Dansk Radio Reklame (Danish Radio Advertising) covers as many as 28 radio stations in total, with a weekly reach of 20% of Danes aged 19-50.



SOURCE: GALLUP RADIO METER, 2018 – WEEKLY REACH



COMMERCIAL RADIO IS DOMINATED BY ONE PLAYER

BAUER is by far the largest network.

On average the target group aged between 19-50 listens to 54 minutes of commercial radio everyday. Commercial and public service combined, the target group aged between 19-50 listens to 1 hour and 44 min. per day.

Dansk **Radioreklame**

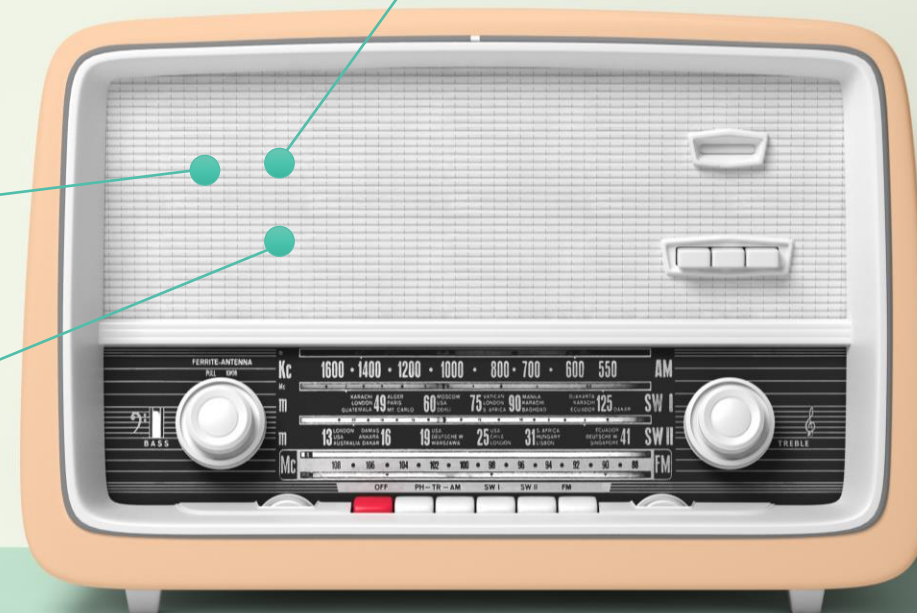
Weekly reach: 445.640
Weekly reach: 20%
(A19-50)



Weekly reach: 1.702.010
Weekly reach: 56%
(A19-50)

TOTAL

Weekly reach: 1.771.670
Weekly reach: 72%
(A19-50)



THE PRINT MARKET

Ad Spend 2016 26%

Ad Spend 2017 24%

Print ad spend share of the total ad expenditure is down 2% from 2016 to 2017.

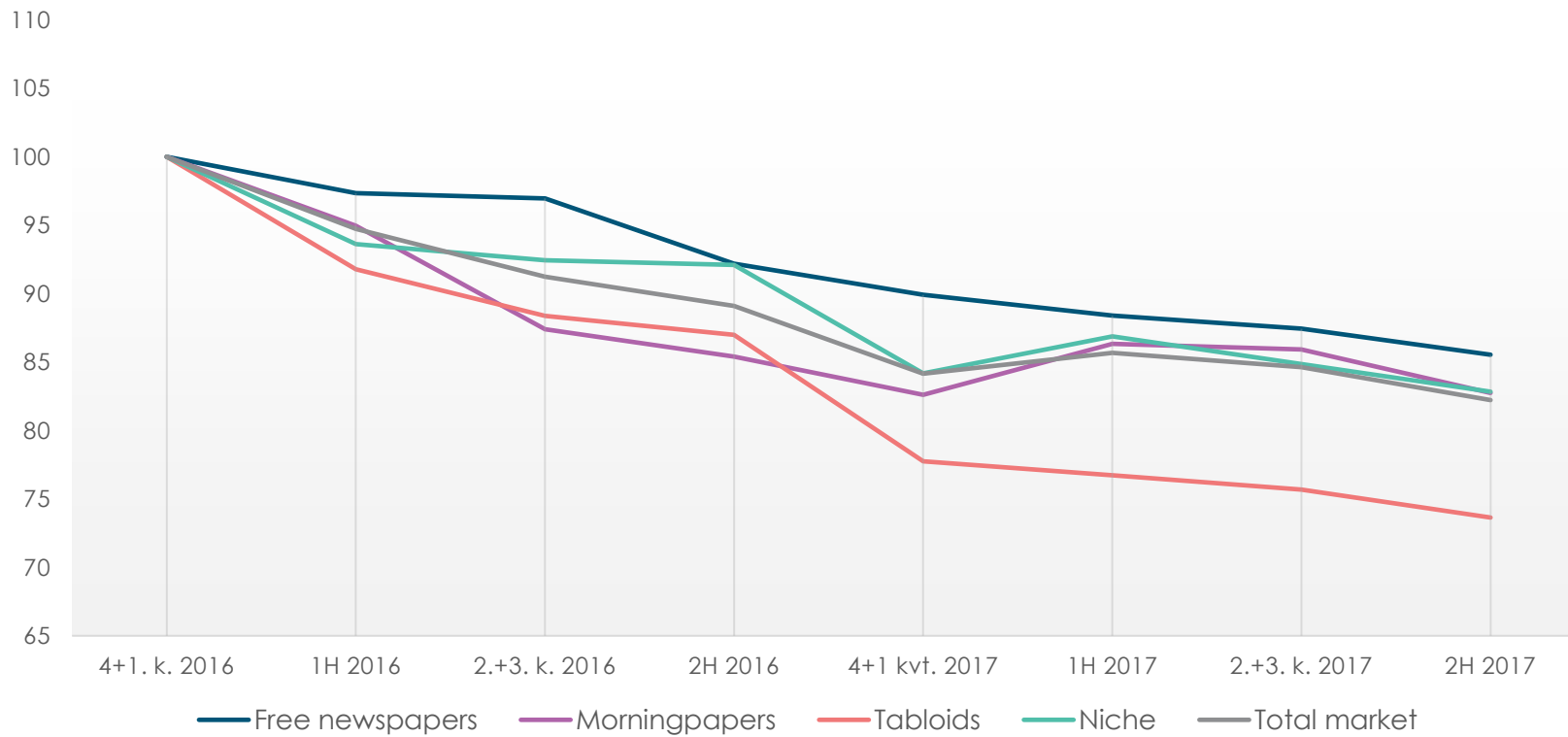
New business focus:

- Cross selling to online, web-TV, mobile
- Native and advertorials
- Events

SOURCE: MEDIEUDVIKLING 2017



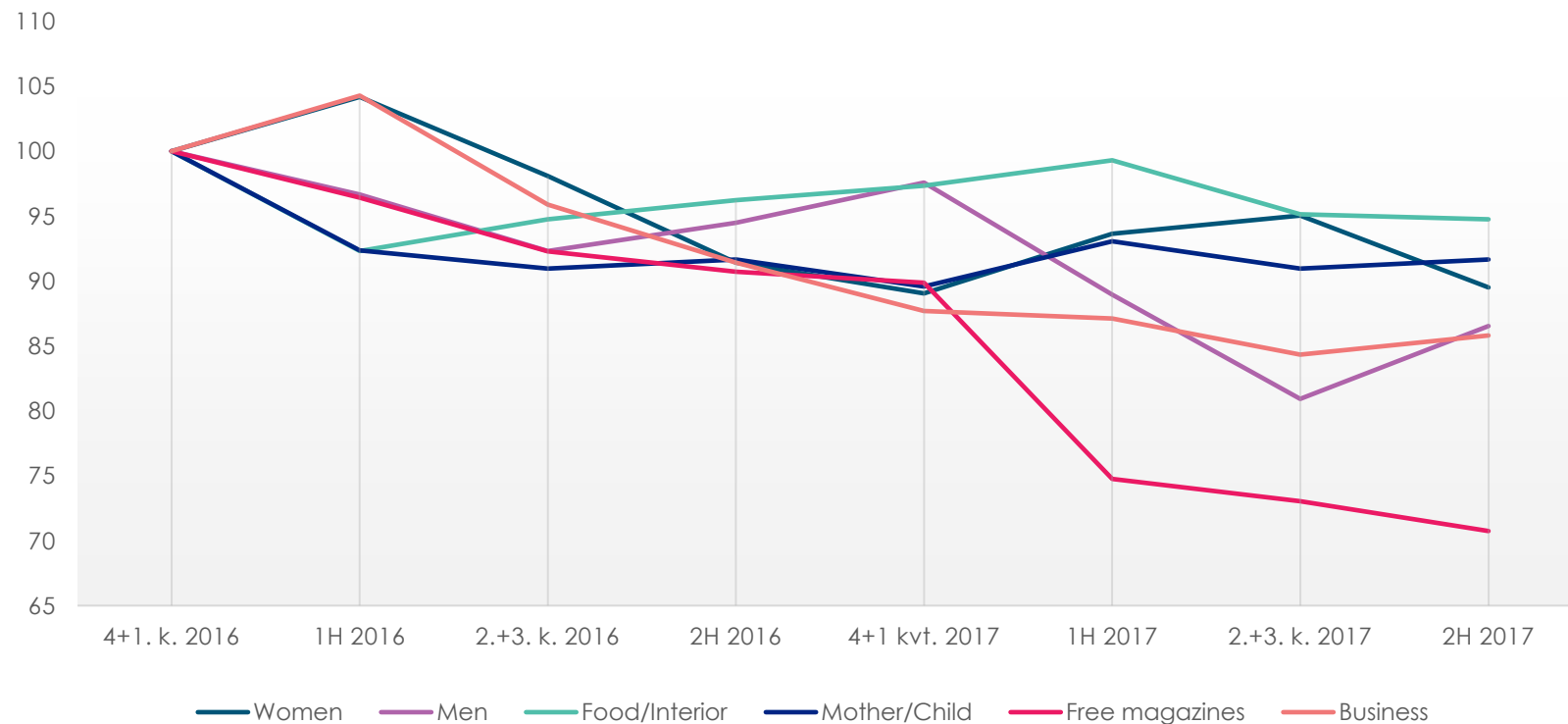
DAILIES: DECREASING READERSHIP



Printed newspapers readership is dropping year by year especially Tabloids.



MAGAZINES: SLOW DECREASE IN READERSHIP



There is a decrease in readership on printed magazines especially free magazines are struggling.

SOURCE: TNS GALLUP 2015-2017



PRINT TOP 10 DAILIES & MAGAZINES

DAILIES	READERSHIP
B.T. MetroXpress	449.000
Politiken	263.000
JyllandsPosten	200.000
Weekendavisen	191.000
Berlingske	160.000
Jydske Vestkysten	125.000
Børsen	123.000
BT	112.000
NORDJYSKE Stiftstidende	98.000
Ekstra Bladet	103.000

MAGAZINES/WEEKLIES	READERSHIP
Samvirke (M)	1.129.000
Idé Nyt (M)	1.057.000
Ældre Sagen (M)	788.000
Hus Forbi (M)	564.000
VoresVilla (M)	536.000
Ud & Se (M)	447.000
Illustreret Videnskab (M)	439.000
Motor (M)	400.000
Billed Bladet (W)	379.000
Bo Bedre (M)	377.000

W: WEEKLIES M: MONTHLY

OOH MARKET

2 KEY PLAYERS - 4 SMALLER PLAYERS

AFA JCDecaux

Digital OOH in Copenhagen
Best national coverage
Best large city coverage
Railroad Digital Abribus (national)
DOOH network (mall media)

OutOfHomeMedia

Phone: +45 31413131
Busses (99% share)
Retail abribus

CITY Media visualart

Phone: +45 70206205
Bulletins & spectaculars
Focus: DOOH network

Clear Channel

Copenhagen METRO
DOOH network (mall media)

Eyemedia

Phone: +45 21486708
Spectaculars
Pop-up scaffolds

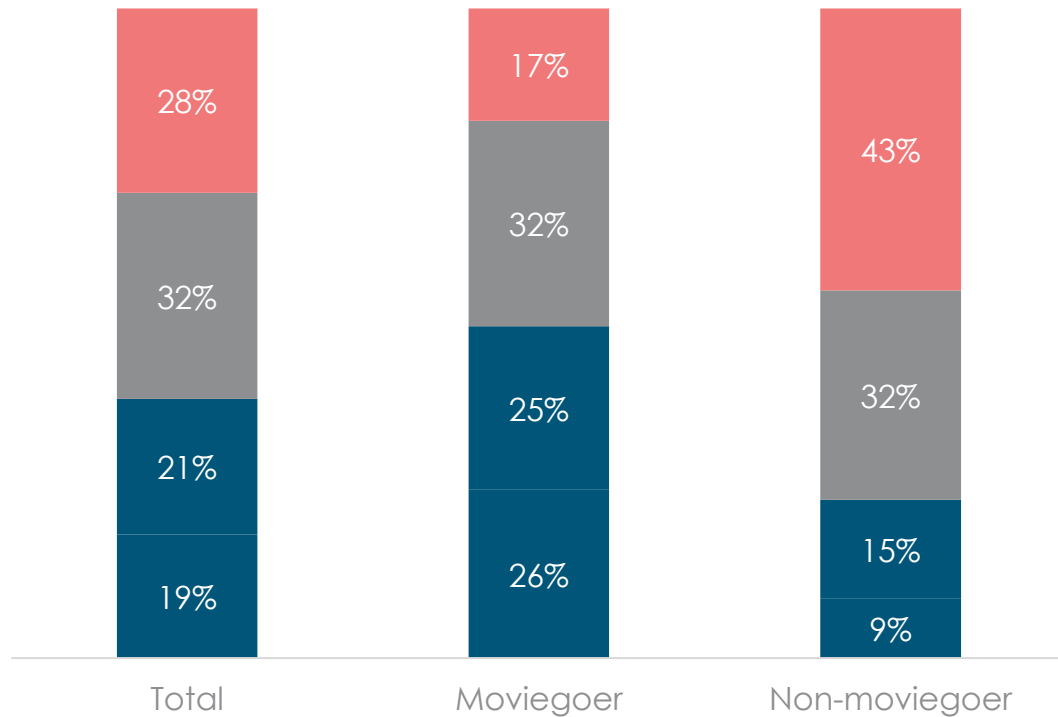
AIRMAGINE

Phone: +45 36189444
Copenhagen Airport



CINEMA

■ 12-24 years ■ 25-39 years ■ 40-59 years ■ 60 years +



Cinema audience is younger than the general population. People aged up to 34 years are particularly overrepresented.

Moviegoers: Have been to the cinema within the last half year.

Non moviegoers: Never go to the cinema.

SALES, PRODUCTION & DISTRIBUTION

Dansk Reklame Film (DRF)

Phone: +45 33325400

Web: drf.dk/kontakt/

40 cinemas = 26%

226 screens = 51%

74% of all ticket sales

FS2 Advertising

Phone: +45 97513070

Web: www.fs2.dk/kontakt-fs2

Mail: kontakt@fs2.dk

83 cinemas and 181 screens

26% of all ticket sales

2. TRAVEL ADVERTISING ON DANISH MEDIA

TRAVEL SECTIONS

DAILIES - PRINT & WEB

Title

Jyllands-Posten

Web: jannonce.dk
Phone: +45 8738 3535
Mail: annonce@jp.dk
Readers: 171.000

Ekstra Bladet (tabloid)

Web: eb.dk
Phone: +45 33111313
Mail: lb@eb.dk
Readers: 96.000

POLITIKEN

Web: pol.dk
Phone: +45 3347 2982
Mail: annoncer@pol.dk
Readers: 237.000

Notes

Several specials a year on travel. Target audience is western Denmark. Sunday is particularly interesting. 9th biggest news site.

Yellow tabloid newspaper. Several specials on travel a year. Number 3 news site in Denmark with 863K+ daily visitors.

6th biggest news site in Denmark. Several specials on travel a year, including the travel channel @politiken_rejser.

Title

Berlingske Tidende

Web: berlingske.dk
Phone: +45 25456004
Mail: lotb@berlingskemedi.dk
Readers: 145.000

B.T. (tabloid)

Web: bt.dk
Phone: +45 33757533
Mail: lotb@berlingskemedi.dk
Readers: 81.000 / 425.000 (BT. Metro)

BORSEN (pleasure)

Web: borsen.dk
Phone: +45 72423320
Mail: annonce@borsen.dk
Readers: 115.000

Notes

15+ specials a year on travel. Target audience is eastern Denmark.

Yellow tabloid newspaper. Several specials on travel a year.

Business title. Weekend section on Fridays is particularly interesting: Børsen Pleasure

TRAVEL SECTIONS

MAGAZINES, JOURNALS & WEB

Vagabond

Web: <https://vagabond.biz/the-magazine>

Phone: +45 22140856

Mail: adamsen@vagabond.info

Circulation/Readers: 30.000/105.000

GoTravelling App

<http://www.gotraveling.org>

Downloads/Readers: 60.000/265.000

Instagram: [@gotravellinginternational](https://www.instagram.com/gotravellinginternational)

[Mediakit](#)

ELLE Travel

<https://www.elle.dk/travel>

@elledanmark

Phone: +45 72342000

Mail: charlotte.juhl@elle.dk

Notes

Vagabond has published travel magazines since 1994. Publishing articles from all over the globe regarding all different sorts of travel. Vagabond is also the organizer behind The Quality Travel Fair in Copenhagen.

With Go Traveling International the entire world is only a swipe away! They bring you vivid travel dreams from all around the planet in various languages such as Danish and English.

ELLE Denmark is digital only. However, it employs several native formats, a strong reader/follower base, galleries, digitalials on so-me, instagram posts, and more.

