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Digital Consumer Trends 2023

The Scandinavian ‘cut’

Deloitte.

About the research

The Scandinavian 'cut' of Deloitte's 2023 Digital Consumer Trends is an annual survey of 4,200 consumers in Sweden, Norway and Denmark as part of a more extensive global survey. The 2023 global study comprises 27,150 respondents across 17 countries and three continents.

Data cited in this report are based on a nationally representative sample of consumers aged 16-75 in Sweden (2,100), Norway (1,050), and Denmark (1,050). The sample follows a country-specific quota on age, gender, region and working status. The survey took place during July 2023 and was carried out online by Ipsos MORI, an independent research firm, using a question set provided by Deloitte.

Chapter 1

Streaming providers have moved from challengers to challenged

In 2023, fewer Scandinavians have access to a streaming service than last year, although those with access consume more. With rising production costs, high levels of churn, and more people sharing subscriptions, streaming platforms are in a difficult battle to keep paying customers engaged.

Key highlights

Streaming providers have moved from challengers to challenged

- Fewer Scandinavians have access to a streaming service, although daily streaming of films and TV series has continued to increase across Scandinavia.
- Many consumers are apparently still willing to share their login credentials. Just under half of Scandinavian subscriptions for Netflix, HBO and Disney+ are currently shared by two or more households.
- National broadcasters enjoy huge success in their respective markets and have been successful in building a broad viewer base across all age groups.

Streamers has become more cost-sensitive

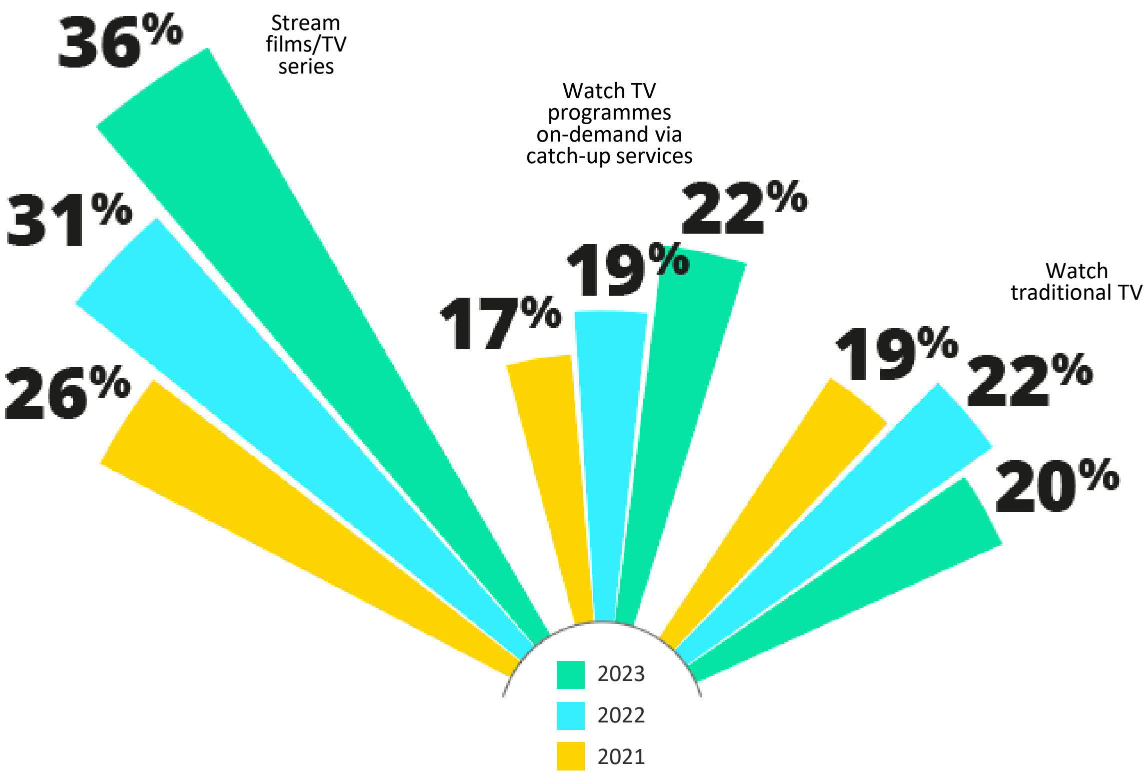
Although Scandinavian consumers continue to have a big appetite for on-screen entertainment, the audience for streaming has become more cost-sensitive, and many consumers have reduced their monthly spending by moving on and off subscriptions.

In 2023, daily streaming of films and TV series has continued to increase across Scandinavia, with 36% of Scandinavians now streaming daily. Similarly, watching TV programmes on demand is also increasing, with 22% of Scandinavians now doing so daily.

The percentage of consumers watching traditional TV each day, however, fell from 22% in 2022 to 20% in 2023. What stands out is that more Scandinavians now watch TV on demand rather than watch it live.

Daily on-screen entertainment

Below is a list of activities that you may do on your devices. Which, if any, of these do you do at least once a day? (Multiple choice question)



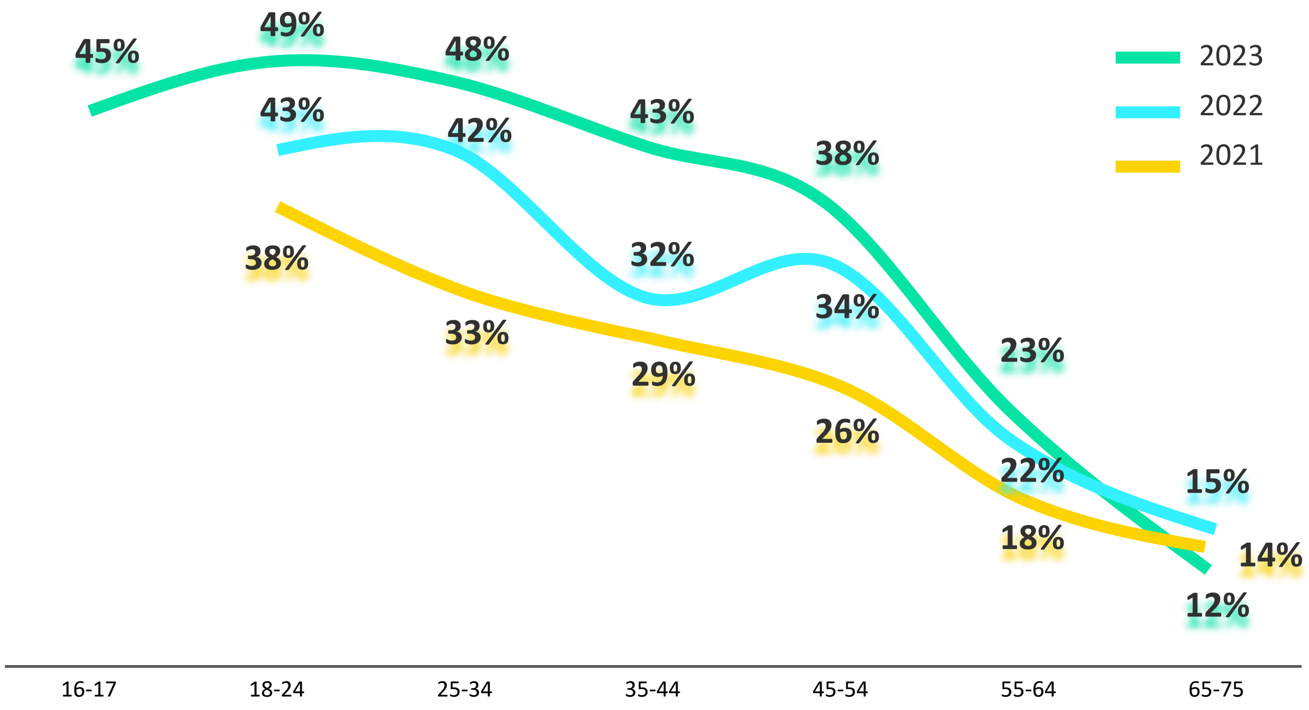
Uptake of daily streaming across all age groups

As in previous years, media consumption varies considerably with age, and young Scandinavians are much more likely than older people to use streaming.

But there has been a significant uptake of daily streaming across almost all age groups (except Scandinavians aged 65-75) between 2021 and 2023.

Daily streaming: Age

Below is a list of activities that you may do on your devices. Which, if any, of these do you do at least once a day? (The figure shows the respondents who chose "Stream films/series") (Multiple choice question)



Geography also plays a role

Danish, Swedish and Norwegian media consumers are offered a slightly differing mix of local and international platforms.

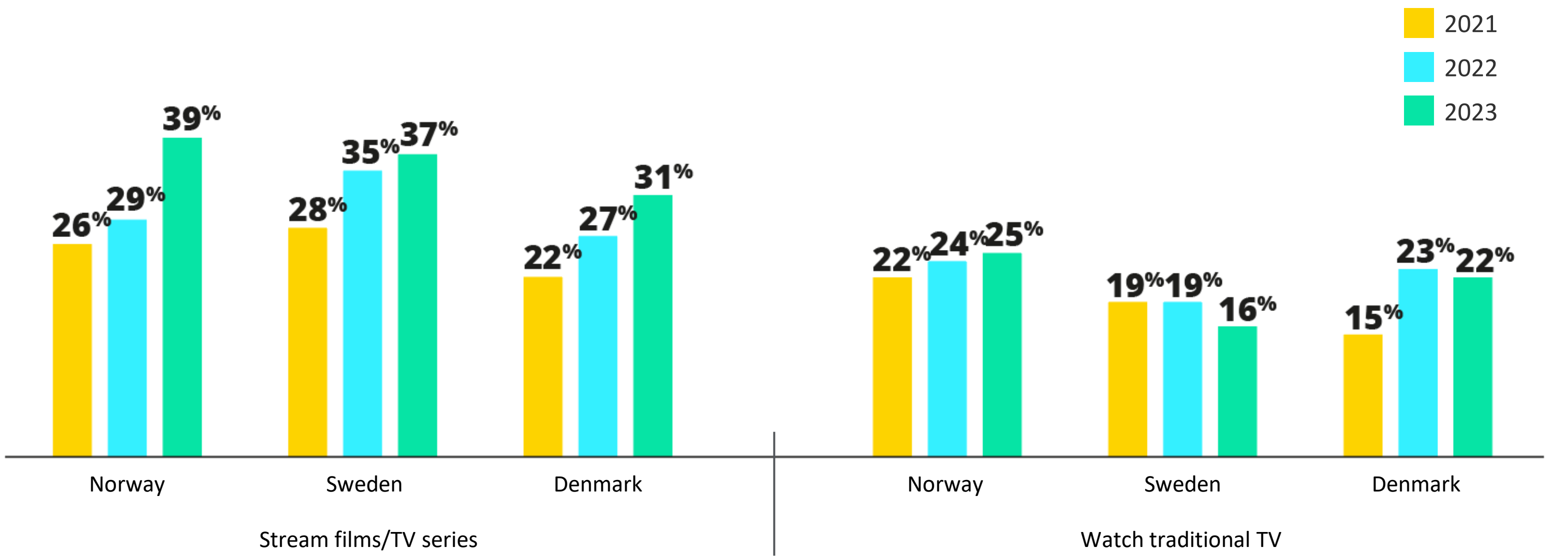
Norwegian consumers seem to enjoy the abundance of streaming services now available, with 39% in this year's survey streaming film or TV every day (up from 26% in 2021).

Swedish consumers are not far behind. 37% of Swedish consumers stream film or TV every day, compared to 28% two years ago.

And consumption in Denmark is also on the rise: 31% now use streaming services every day compared to just 22% in 2021.

Daily on-screen entertainment: Country

Below is a list of activities that you may do on your devices.
Which, if any, of these do you do at least once a day? (Multiple choice question)



Streaming subscription fatigue hits Scandinavia

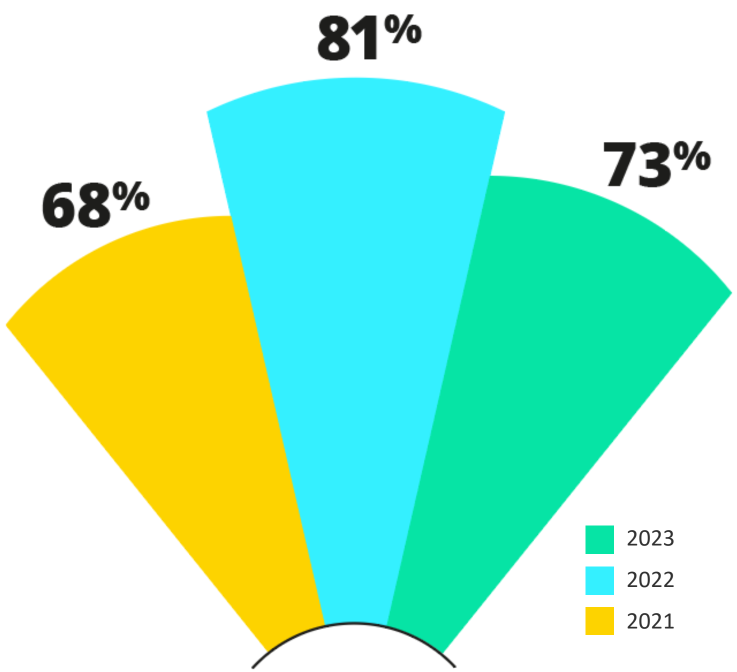
With such strong demand for entertainment, you would think that Scandinavia should be a very attractive market for local and global providers of subscription video on demand (SVOD).

However, a big question is whether Scandinavian consumers are willing to pay for subscriptions, or whether they are switching to cheaper or free alternatives.

And it is not good news for streaming providers: fewer Scandinavians have access to a paid video streaming service than a year ago, with the numbers falling from 81% in 2022 to 73% in 2023 − a significant decline.

Access to SVOD services

Which, if any, of the following paid digital subscription services do you have access to? (The figure shows the respondents who have access to at least one video streaming service) (Multiple choice question)



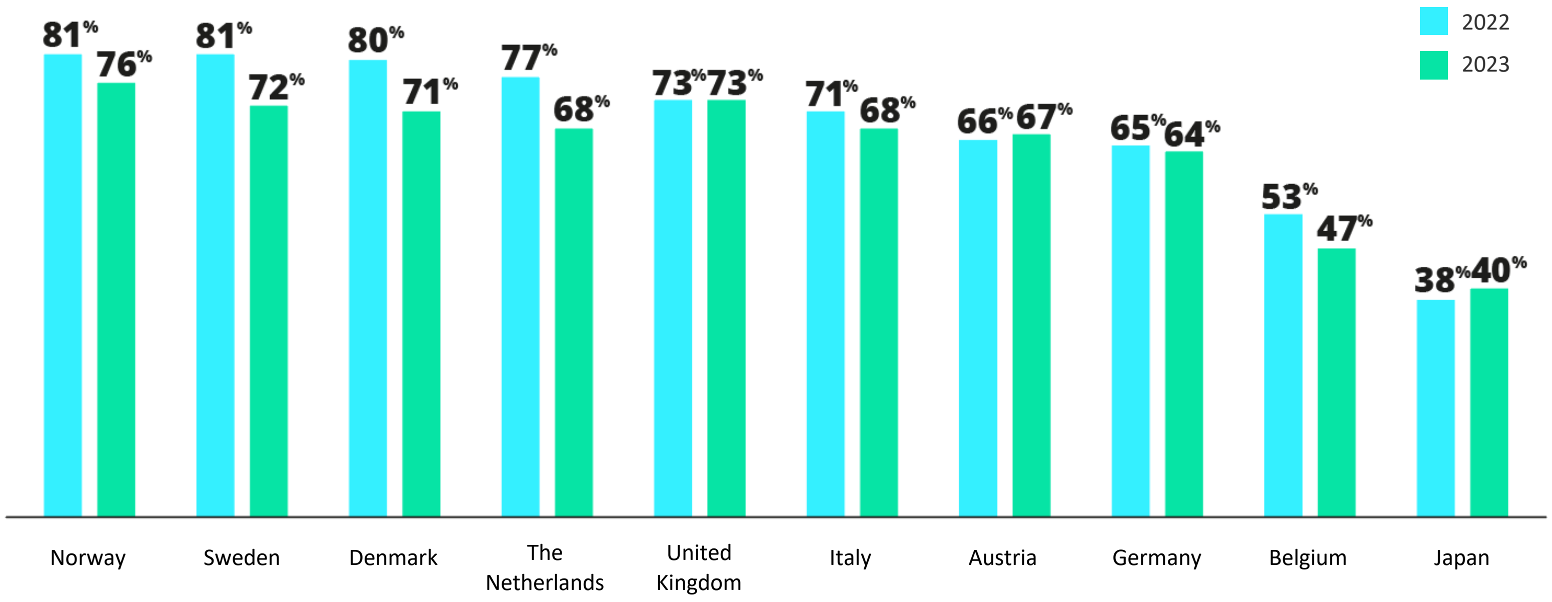
Streaming declines in other market as well

Other streaming markets are also in decline, especially in the Netherlands, Italy, Germany and Belgium which all show visible signs of subscription fatigue.

Across the 12 countries shown in the figure, only Austria and Japan show increasing SVOD access, while the UK market for now remains stable.

Access to SVOD services: Country

Which, if any, of the following paid digital subscription services do you have access to? (The figure shows the respondents who have access to at least one video streaming service) (Multiple choice question)



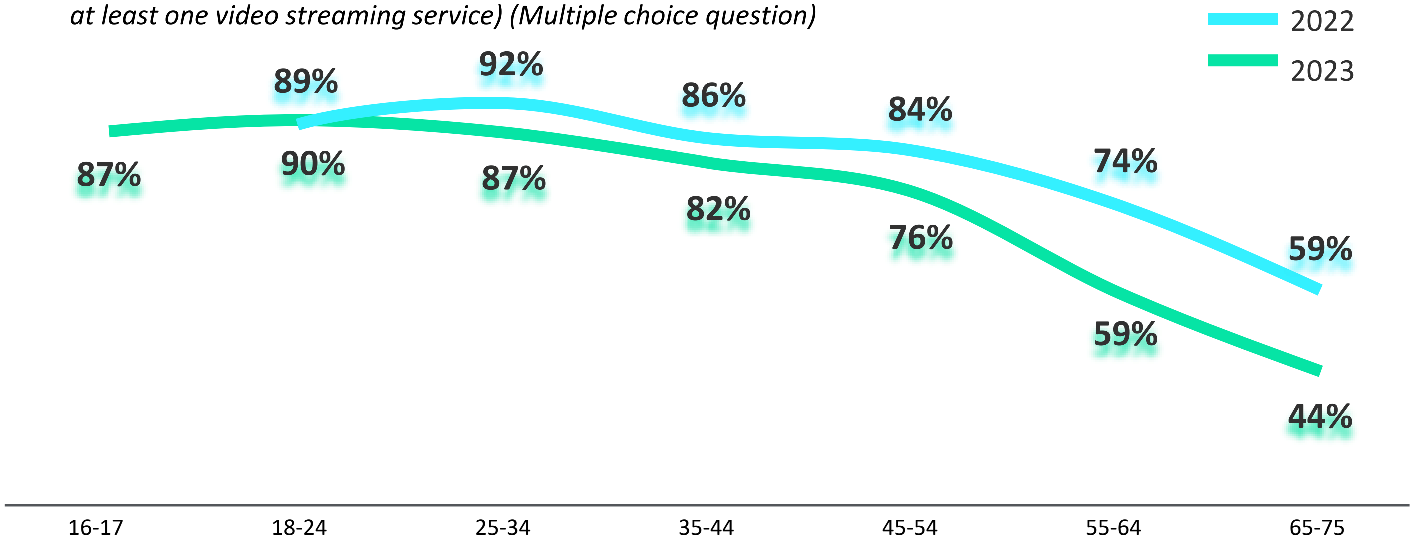
Subscription fatigue is driven largely by mid-age and older consumers

What is also likely to concern streaming providers is that the subscription fatigue seems to be driven largely by mid-age and older consumers who would normally be the most financially stable.

However in this current period of high inflation, many consumers are clearly making necessary adjustments to their spending, and streaming access could be one of those household budget items that is nice-to-have, but not need-to-have.

Access to SVOD services: Age

Which, if any, of the following paid digital subscription services do you have access to? (The figure shows the respondents who have access to at least one video streaming service) (Multiple choice question)



As the world churns

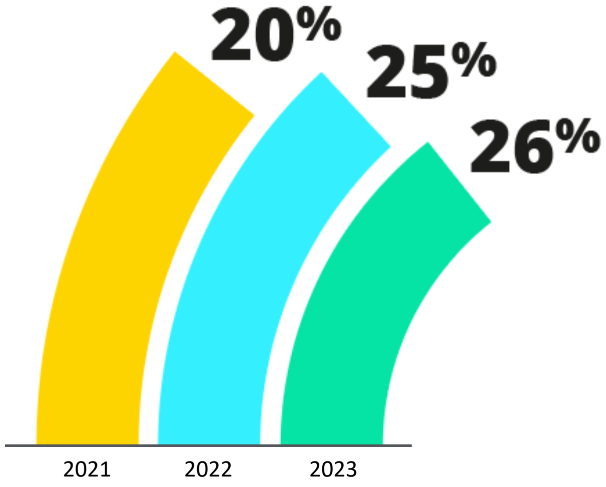
When there is churn among Scandinavian subscribers, streaming providers not only lose subscription revenues but might also even fail to recoup their acquisition costs for subscribers who cancel early.

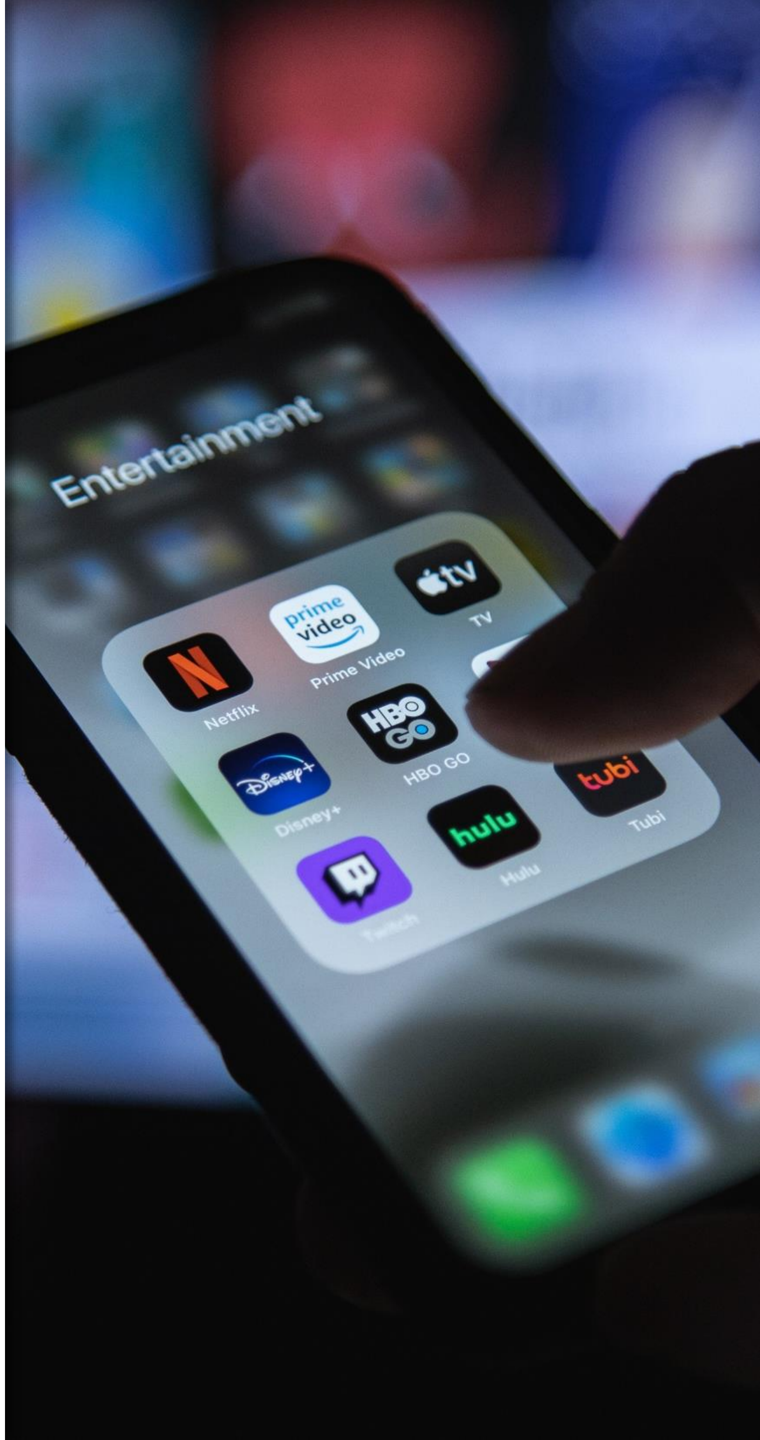
While many streamers want to raise the cost of premium subscriptions, opportunistic audiences are churning and returning, although at lower rates than in the previous two years.

This year, 26% of Scandinavian consumers said that they (or someone else in their household) had cancelled an existing subscription to a video streaming service in the past 12 months (up from 20% in 2021).

Cancelling subscriptions

In the last 12 months, have you or someone else in your household subscribed to any paid subscriptions for a video streaming service (e.g. Netflix, Disney+), or cancelled any existing ones? (The figure shows the respondents who have cancelled a video streaming service)
(Multiple choice question)





Young consumers are quick to leave a streaming service, but more persuaded to come back

27% of Scandinavian consumers have subscribed or re-subscribed to an SVOD service during the previous 12 months, down from 34% in 2022.

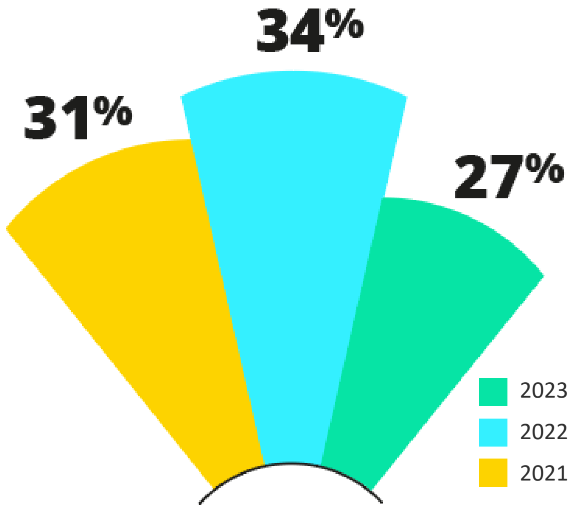
Churn is driven primarily by young consumers who are more likely to cancel a subscription and re-subscribe later. For example, 36% of Scandinavian consumers aged 25 to 34 had cancelled a subscription during the previous 12 months compared to only 16% of consumers aged 55 to 64.

However, the differences between cancellations and subscriptions are more or less similar across the various age groups.

Young consumers are apparently quick to leave a streaming service, but they are also more easily persuaded to come back.

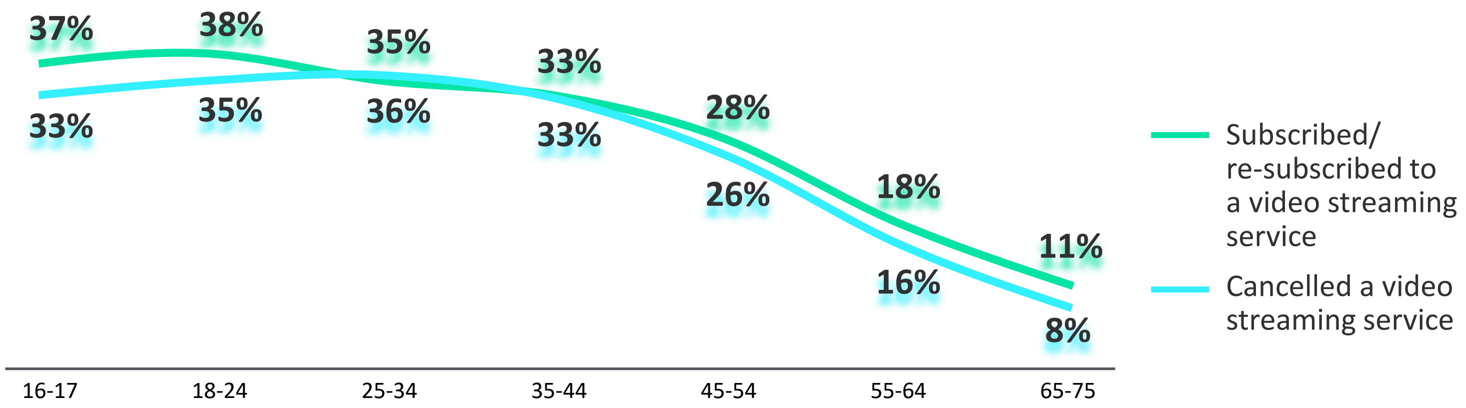
SVOD services subscribers and re-subscribers: Yearly development

In the past 12 months, have you or someone else in your household subscribed to any paid subscriptions for a video streaming service (e.g. Netflix, Disney+), or canceled an existing ones? (The figure shows the respondents who subscribed to a new video streaming service and/or have re-subscribed to a previously cancelled video streaming service) (Multiple choice question)



Cancelling and subscribing: Age

In the last 12 months, have you or someone else in your household subscribed to any paid subscriptions for a video streaming service (e.g. Netflix, Disney+), or cancelled any existing ones? (Multiple choice question)

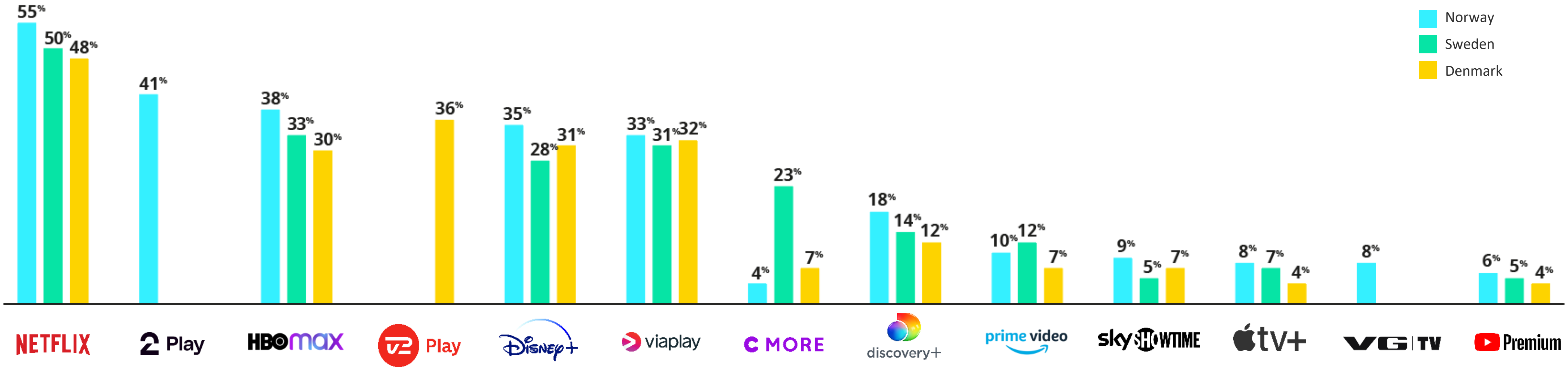


Netflix dominates the market

Looking at the overall Scandinavian market, Netflix has continued its dominance in 2023, with 55% of Norwegian consumers, 50% of Swedish consumers and 48% of Danish consumers enjoying a Netflix subscription either directly or through a bundle.

Access to SVOD services: Country

Which, if any, of the following digital subscription services do you have access to? (Multiple choice question)



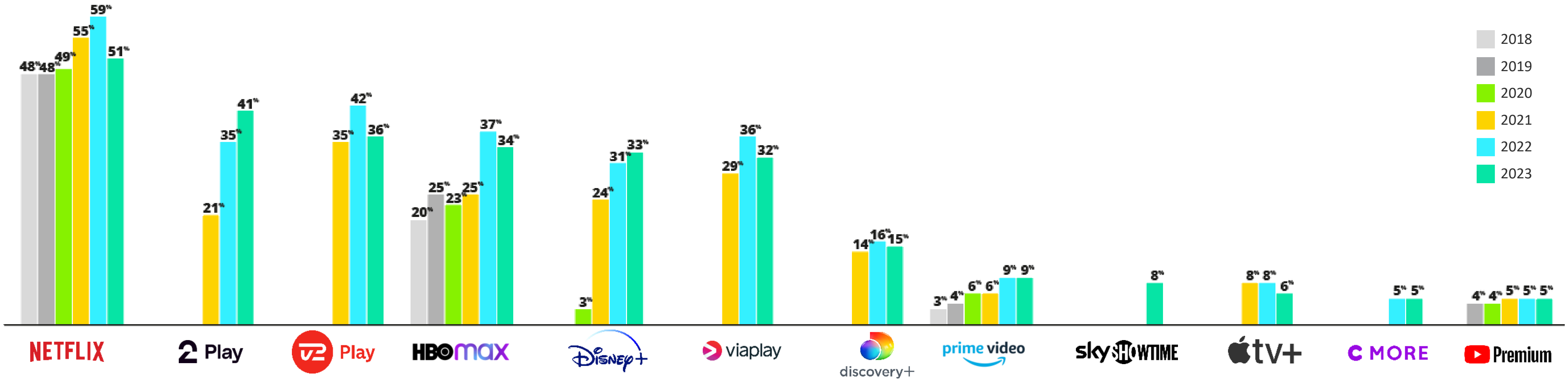
A streaming market in constant motion

Looking at the past five years, it is evident that the Scandinavian streaming market is in constant motion, with new players entering and 'old' players fighting to maintain their market share. For example, Netflix, Viaplay and HBO Max saw a decline in their market share in 2023.

Some players have failed to break through to a mainstream audience (Prime Video, Youtube Premium and Apple TV+ are examples), but other players such as Viaplay, HBO Max and Disney+ have been relatively successful, with around one-third of Scandinavian consumers currently having access to them.

Access to SVOD services

Which, if any, of the following digital subscription services do you have access to?
(Multiple choice question. Sweden is not included in the graph due to a lack of data on some brands.)



Subscription sharing is still a problem

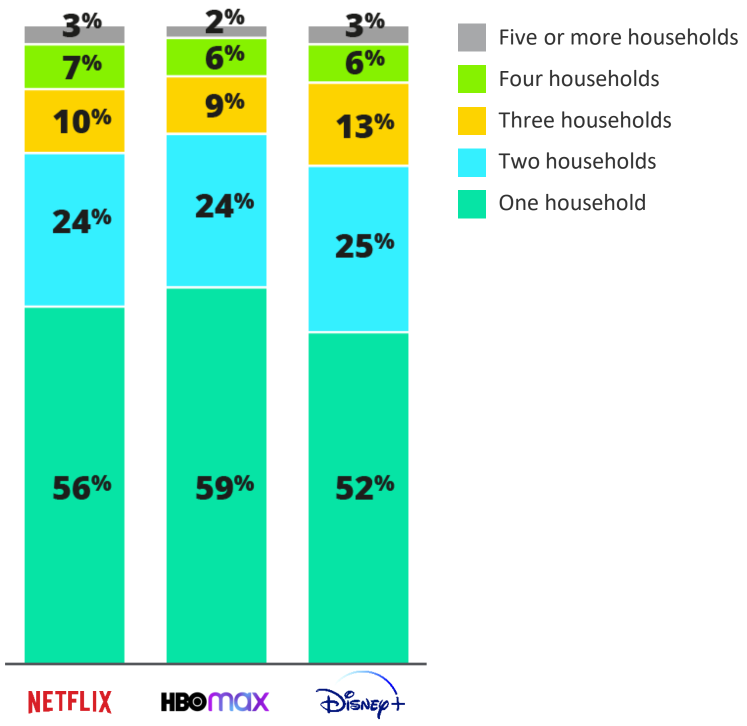
While streaming providers fight against churn and rising production costs, they also face problems with people sharing subscriptions.

In Scandinavia, many consumers are apparently still willing to share their login credentials, so that family and friends can save money. Just under half of Scandinavian subscriptions for Netflix, HBO and Disney+ are currently shared by two or more households.

Our survey also shows that about 50% of current Scandinavian 'free riders' would be unwilling to pay for their own subscription if subscription sharing was banned by the large streaming providers.

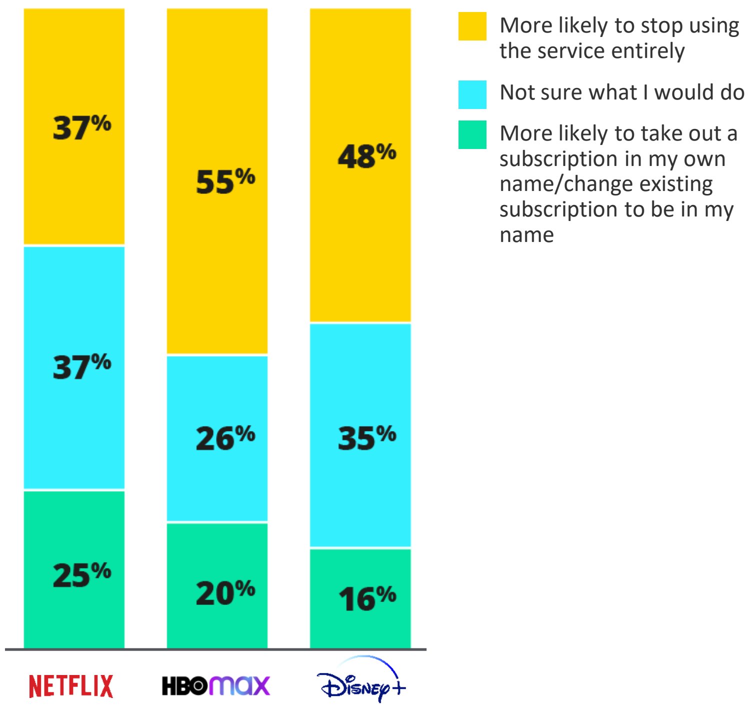
Subscription sharing: Brands

You mentioned that you have access to a video subscription account. Including your own, approximately how many households share each of the following accounts?



Willingness to pay if subscription sharing was banned

If each of the following video streaming companies were to ban multiple households from using the same account, would you be more likely to take out a subscription in your own name, more likely to stop using the service entirely, or are you not sure?



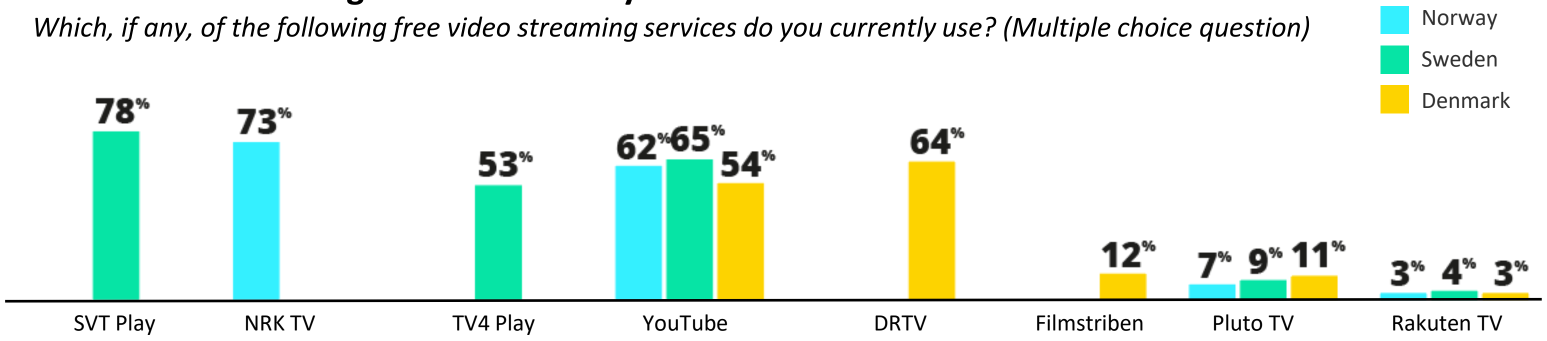
The success of national broadcasters

Scandinavian national broadcasters enjoy huge success in their respective markets. SVT Play, for example, is used by 78% of Swedish consumers, NRK TV is used by 73% of Norwegian consumers, and 64% of Danish consumers use DRTV.

What is more, national broadcasters have been successful in building a broad viewer base across all age groups, whereas the international commercial streaming services cater primarily to younger consumers and are struggling to attract older target audiences.

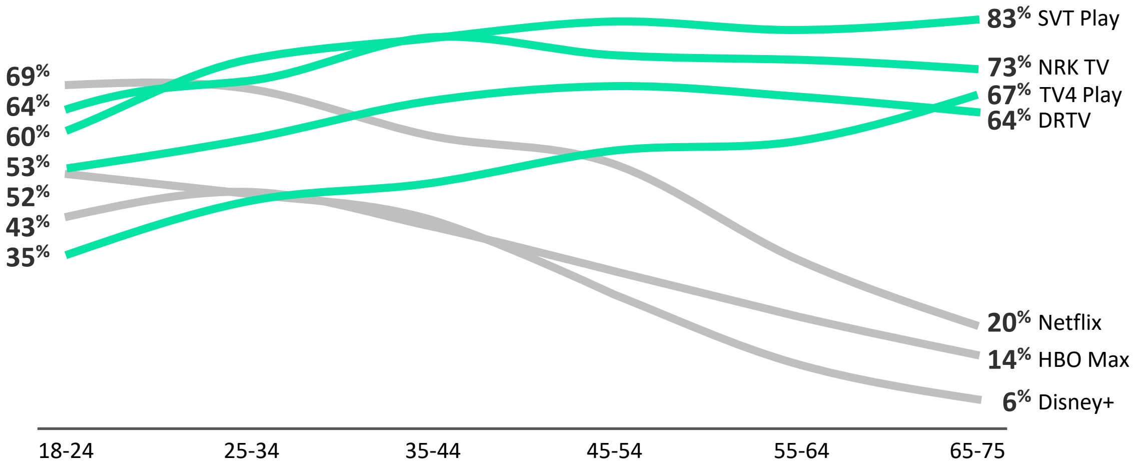
Use of free streaming services: Country

Which, if any, of the following free video streaming services do you currently use? (Multiple choice question)



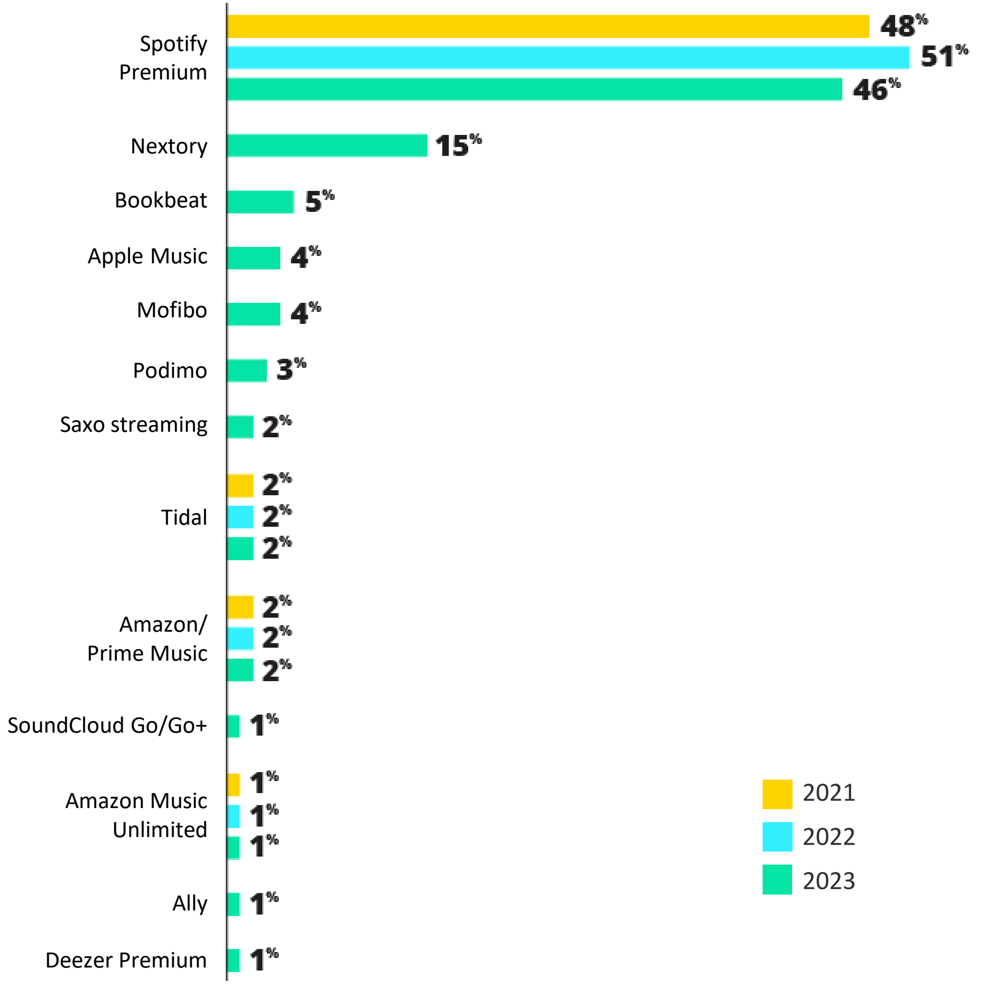
Free and paid streaming services: Age

International commercial streaming services: Which, if any, of the following digital subscription services do you have access to?
National broadcast streaming services: Which, if any, of the following free video streaming services do you currently use? (Multiple choice questions)



Spotify dominates audio subscription

Scandinavian consumers are also accustomed to paying for music and audio – a market dominated largely by Spotify, although its numbers show some signs of customer fatigue. 46% of Scandinavian consumers say that they have access to Spotify. This number was 48% in 2021 and peaked at 51% in 2022.



Access to audio subscriptions

Music: Which, if any, of the following digital subscription services do you have access to? Please also consider subscriptions paid for by other people that you can access, such as other members of your household or family, or by your job.

Podcast/audiobook: Which, if any, of the following digital podcast or audiobook subscription services do you have access to? (Multiple choice questions)

Will bundles affect profitability even more?

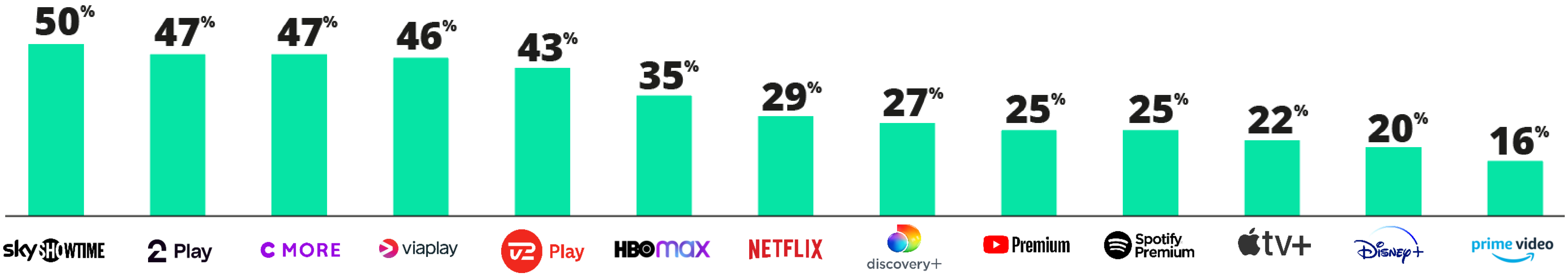
Many Scandinavian consumers have access to both video streaming and audio services through a bundle – ranging from 16% of consumers who have access to Amazon/Prime Video to 50% of consumers who have access to SkyShowtime.

Although bundling can be an easy way to acquire new subscribers, it can also affect profits, because bundling typically comes with a discount. It also takes away the direct contact between providers and consumers, especially if the technical setup only allows the consumer to access content through a link from the bundle provider, rather than going directly to the relevant platform.

Interestingly, up to two-thirds of consumers who access a service through a bundle say they would pay directly to the provider if the service was not included in their bundle.

Access to streaming service through a bundle

Which, if any, of the following streaming services do you have access to through a bundle? (The figure shows share of users who have access through a bundle) (Multiple choice questions)



Chapter 2

Generative AI is all the rage

Generative AI (Gen AI) is dominating public interest within the broader field of artificial intelligence. Within a year of the launch of ChatGPT, 31% of Scandinavian consumers have used a Gen AI tool, and many have already become regular users. But there are some concerns.

Key highlights

Generative AI is all the rage

- Many Scandinavian consumers have tried a Gen AI tool and have already become regular users. Age is a major factor when it comes to both the awareness and use of Gen AI. 16-17 year-olds are almost ten times more likely to use Gen AI compared to 65-75 year-olds.

- Scandinavian consumers seem eager to use these tools in their work, but at the same time they also worry that Gen AI will reduce the number of jobs available in the future or could replace part of their role in the workplace.

- However, there are concerns about the credibility, bias, misunderstanding and misuse of AI with more than half of Gen AI users believing that responses from Gen AI tools are factually inaccurate.

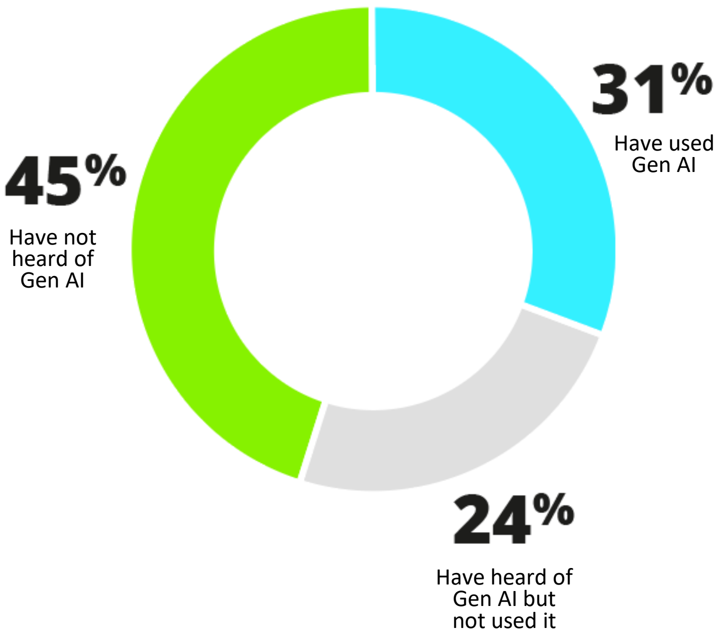
Gen AI is already changing how humans and technology interact

31% of Scandinavian consumers have used at least one Gen AI tool. In addition, 24% have heard about Gen AI tools, but have not yet used one. 45% have not heard about them.

A large proportion of the people who have used a Gen AI tool have already become regular users. 4% of Scandinavians who have used a Gen AI tool now use it at least once a day, 19% use one at least once a week, and another 18% at least once a month. So, 42% are using one at least monthly.

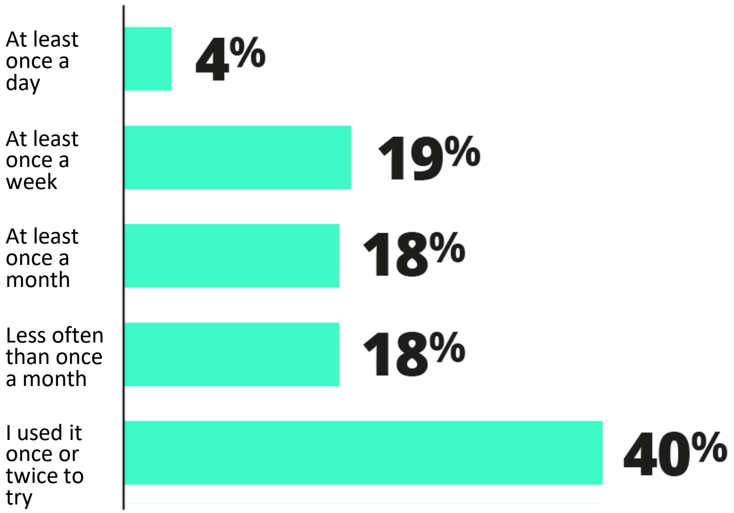
Familiarity with Gen AI

Which, if any, of the following Generative AI tools are you aware of?
Which, if any, Generative AI tools have you used? (Multiple choice questions)



Frequency of Gen AI usage

You mentioned you have used Generative AI (e.g. ChatGPT, DALL-E, etc.). Which of the following best describes your usage?



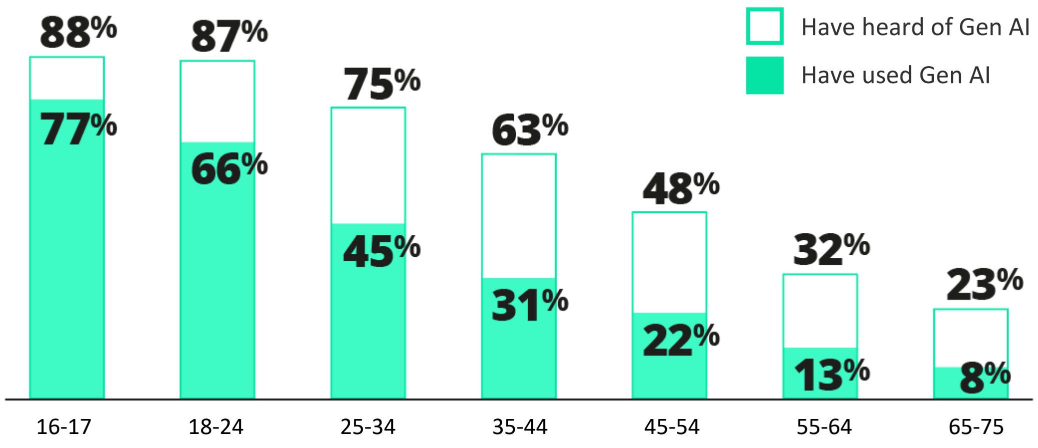
Age and gender influence awareness and usage of Gen AI

The older you are, the less likely you are to either use Gen AI or be aware of it. 16-17 year-olds are almost ten times more likely to use Gen AI compared to 65-75 year-olds, and over twice as likely as 35-44 year-olds.

More men than women are aware of and have used Gen AI: 38% of male Scandinavian consumers have used Gen AI tools compared to 24% of female consumers.

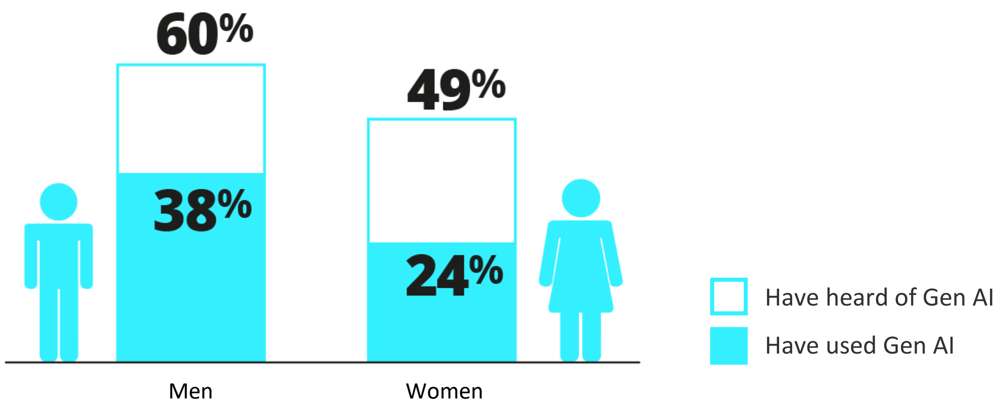
Awareness and use of Gen AI: Age

Which, if any, of the following Generative AI tools are you aware of? (Multiple choice question. The figure shows the respondents who chose at least one tool)
Which, if any, Generative AI tools have you used?
(Multiple choice question. The figure shows the respondents who chose at least one tool)



Awareness and use of Gen AI: Gender

Which, if any, of the following Generative AI tools are you aware of? (Multiple choice question. The figure shows the respondents who chose at least one tool)
Which, if any, Generative AI tools have you used?
(Multiple choice question. The figure shows the respondents who chose at least one tool)

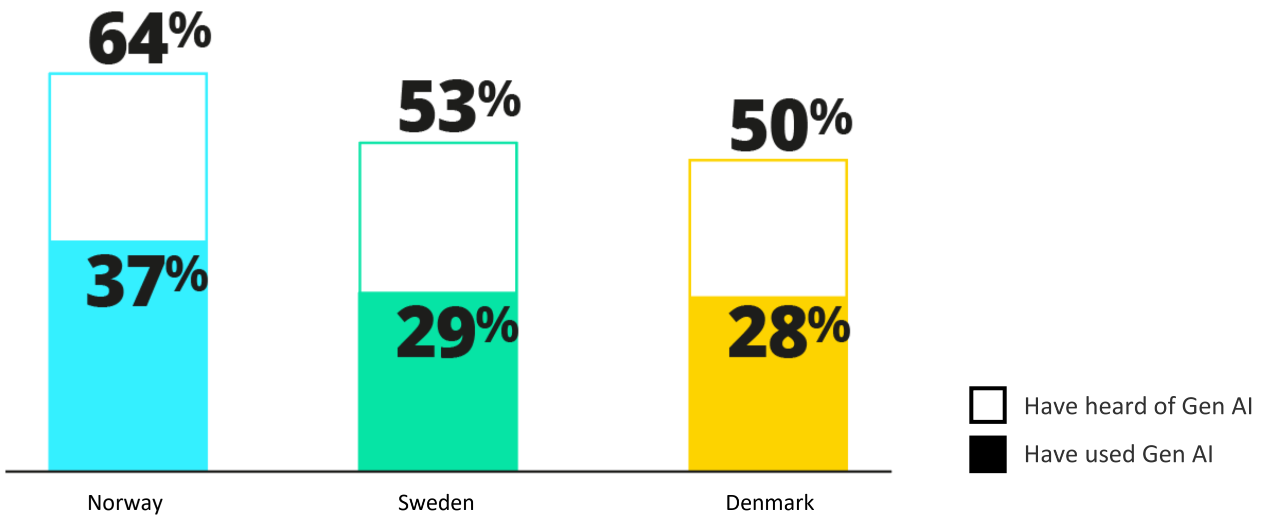


Awareness and usage vary between the Scandinavian countries

64% of Norwegian consumers have heard about Gen AI tools, compared to just over half of consumers in Sweden and Denmark.

Awareness and use of Gen AI: Country

Which, if any, of the following Generative AI tools are you aware of? (Multiple choice question. The figure shows the respondents who chose at least one tool)
Which, if any, Generative AI tools have you used? (Multiple choice question. The figure shows the respondents who chose at least one tool)



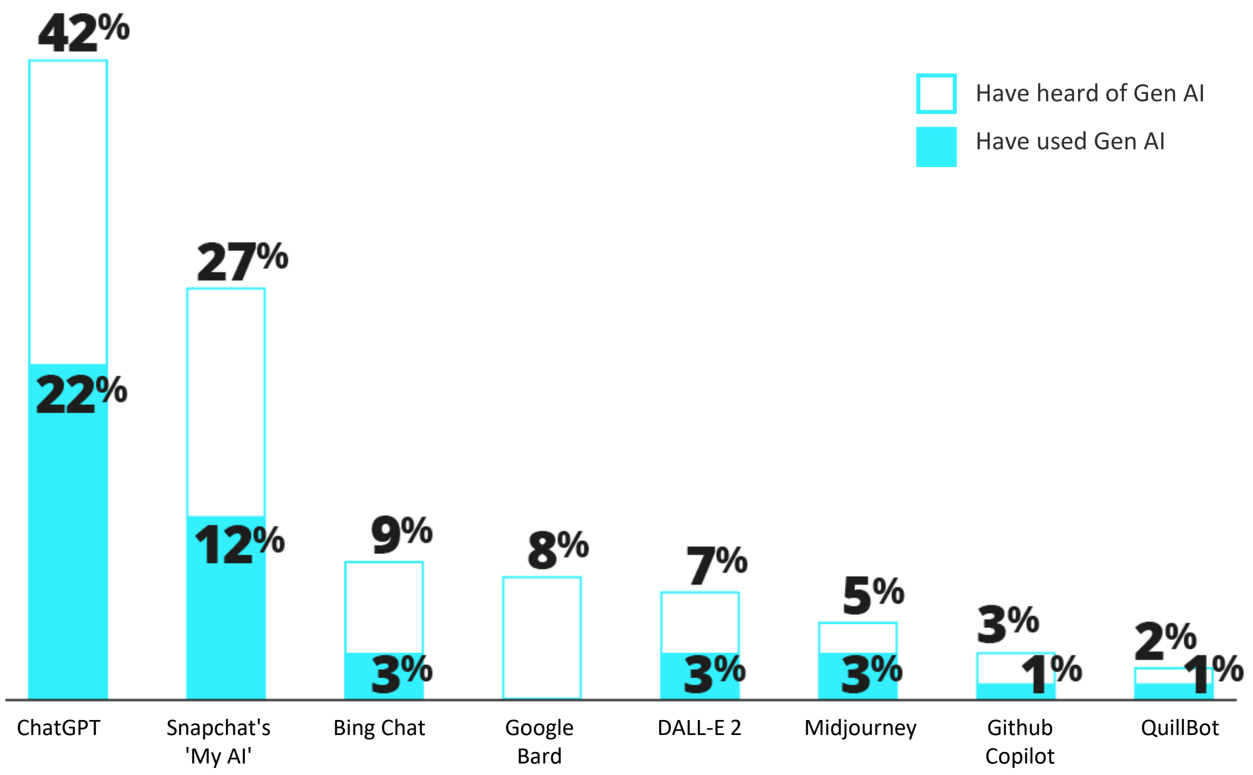
ChatGPT tops the list

Some earlier forms of Gen AI have been available for several years, but it was largely due to ChatGPT providing an easily accessible chat interface, powered by a very large language model, that enabled Gen AI to have a breakthrough moment in late 2022, surprising even specialists in the field.

ChatGPT tops by far the list of Gen AI tools used by Scandinavian consumers. However, other platforms have also started to extend their reach, in particular Snapchat's My AI, a chatbot currently available to Snapchatters.

Awareness and use of Gen AI: Brands

Which, if any, of the following Generative AI tools are you aware of? (Multiple choice question)
Which, if any, Generative AI tools have you used? (Multiple choice question)



Note: Google Bard was not available to users at the time respondents were surveyed. Numbers on use is therefore not included.

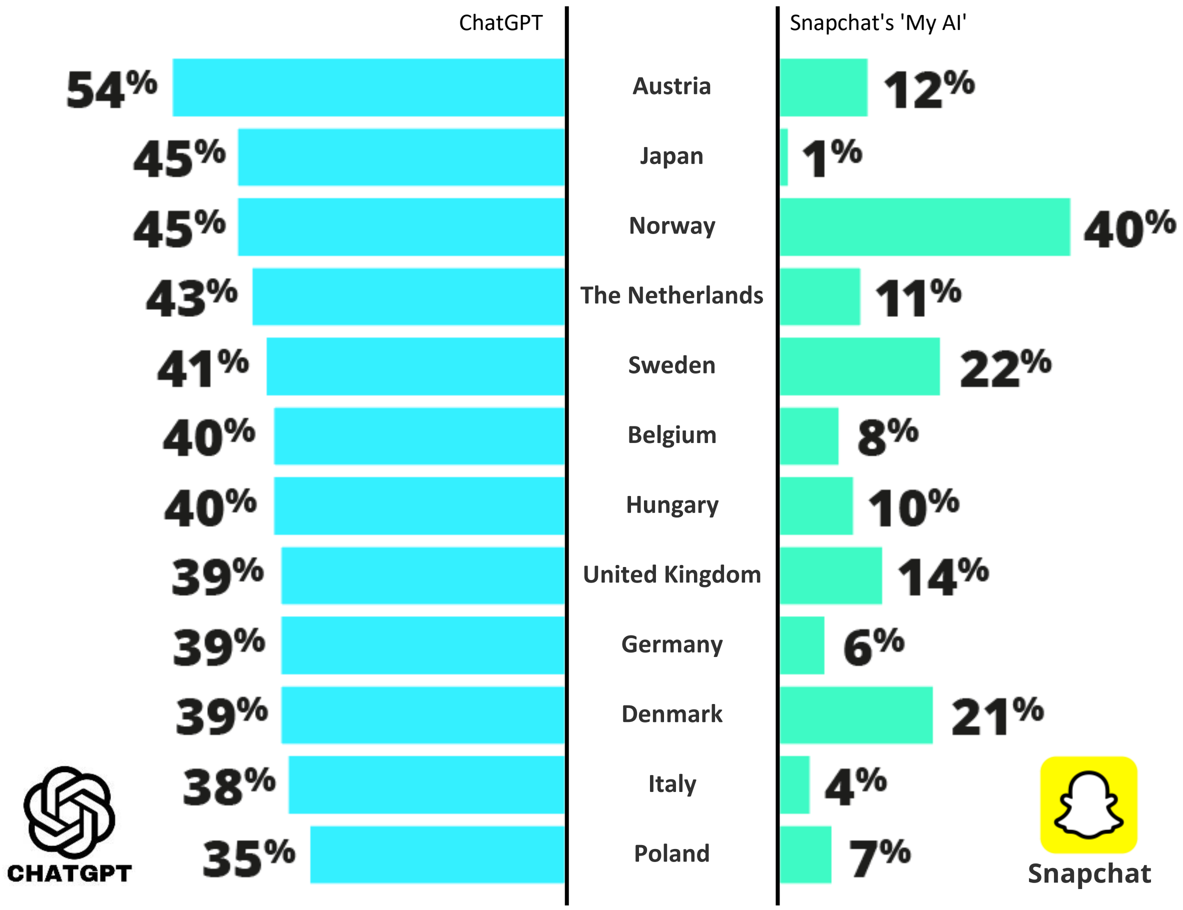
Awareness of ChatCPT and Snapchat’s ‘My AI’

There are vast differences in the awareness of Gen AI. Especially when it comes to Snapchat’s ‘My AI’, which enjoys extensive popularity in some markets while being almost completely absent in others.

For example, 40% of Norwegian consumers have currently heard of My AI, but only 22 and 21% of consumers in Sweden and Denmark respectively – and just 6% in Germany and only 1% in Japan.

Awareness of ChatGPT and Snapchat’s ‘My AI’: Country

Which, if any, of the following Generative AI tools are you aware of? (Multiple choice question)

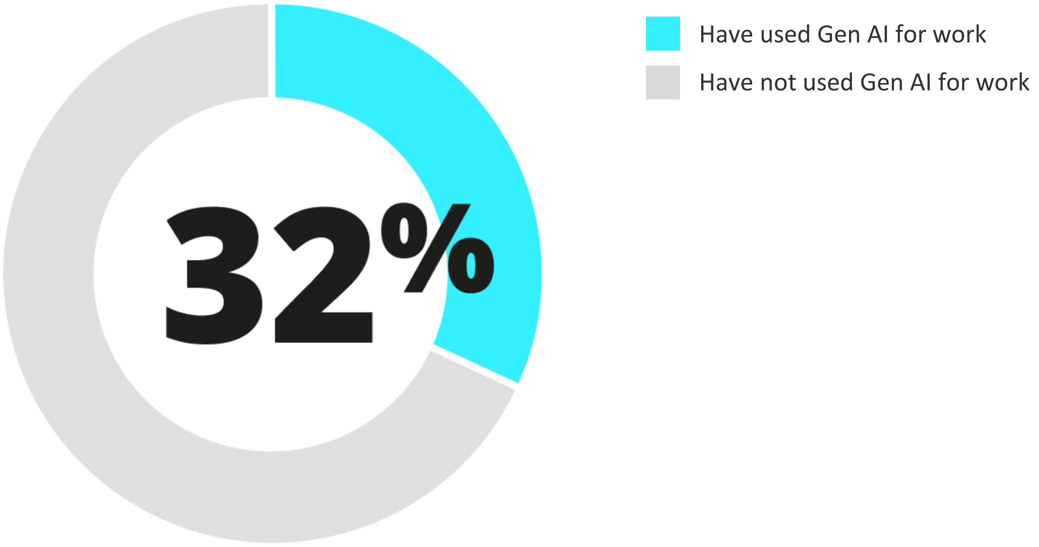


Can Gen AI be used for work?

With the huge global interest in Gen AI, there is increasing focus on how it can be used in business. And Scandinavian consumers are eager to use these tools in their work. 32% of those who have already used Gen AI have used it for work-related purposes.

Work-related use of Gen AI

Which of the following purposes have you used any Generative AI for? (Multiple choice question)



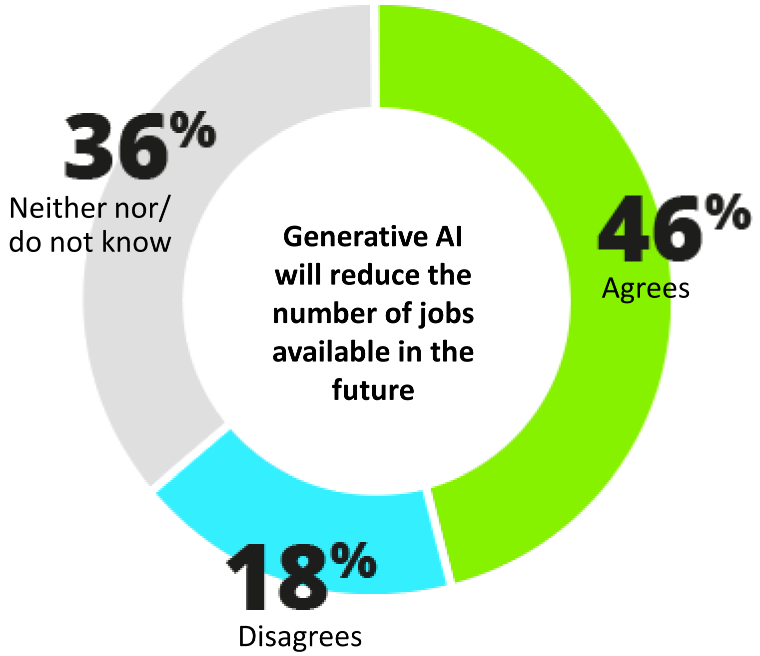
Concerns around using Gen AI for work

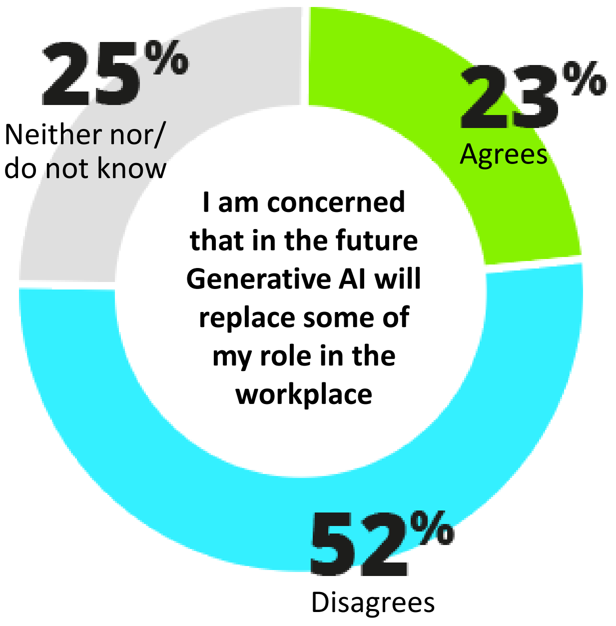
There are concerns about the use of Gen AI in the workplace, given the many instances in which it can potentially take over tasks previously performed by humans.

46% of employees across Scandinavia worry that Gen AI will reduce the number of jobs available in the future – and 23% are concerned that it could replace part of their own role in the workplace.

Concerns regarding Gen AI

To what extent do you agree or disagree with the following statements?





Trust or no trust?

There are also concerns about the credibility, bias, misunderstanding and misuse of AI.

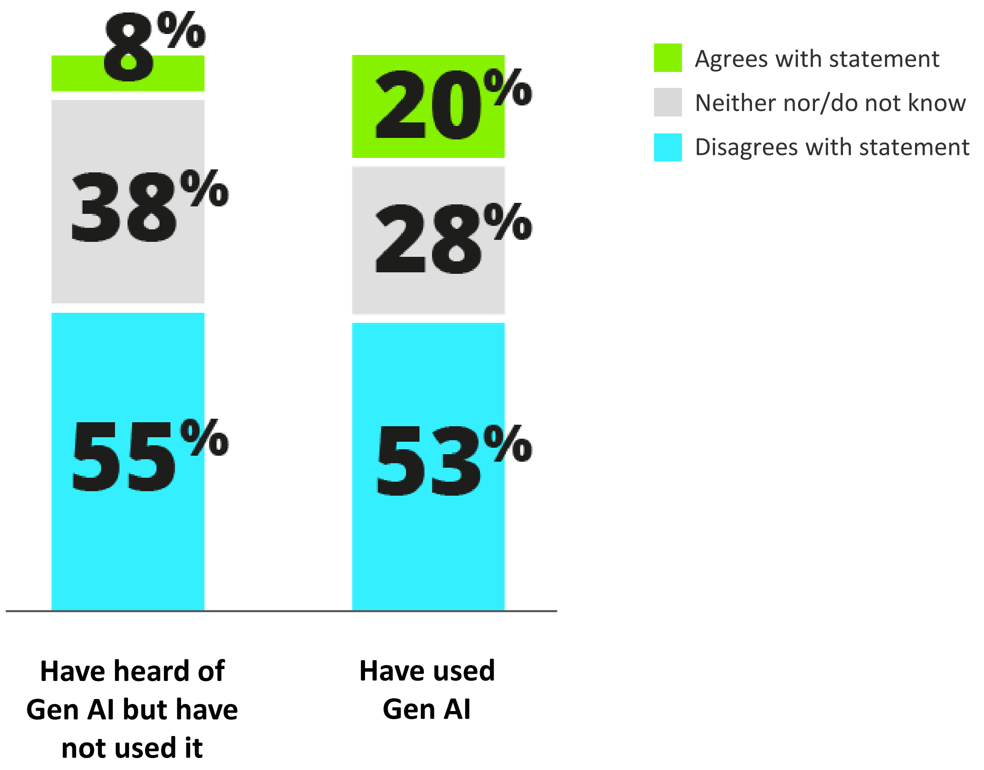
Normally, people who use and are familiar with a given technology are more aware of its limitations than non-users. With Gen AI interestingly – and worryingly – the opposite appears to be true.

Although users should be aware that Gen AI can hallucinate and produce inaccurate answers, one in five users believe that it is always factually accurate (more than double the 8% of those who are only aware of Gen AI but do not use it).

However, Scandinavian users are less overconfident than their UK equivalents, where research has found that 43% of users believe that Gen AI is always accurate.[1]

Attitude towards Gen AI: Factual accuracy

To what extent do you agree or disagree with the following statement: "Generative AI always produces factually accurate responses"?



[1] *https://www2.deloitte.com/uk/en/pages/press-releases/articles/more-than-four-million-people-in-the-uk-have-used-generative-ai-for-work-deloitte.html/*

Gen AI as a creator

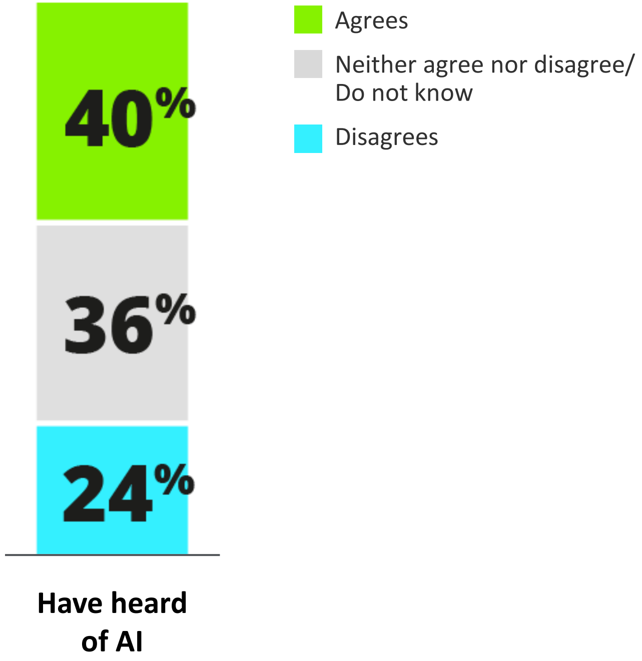
Given that Scandinavians are still in the process of discovering Gen AI technology, it is too early to examine the opportunities and consequences of using it for creative purposes.

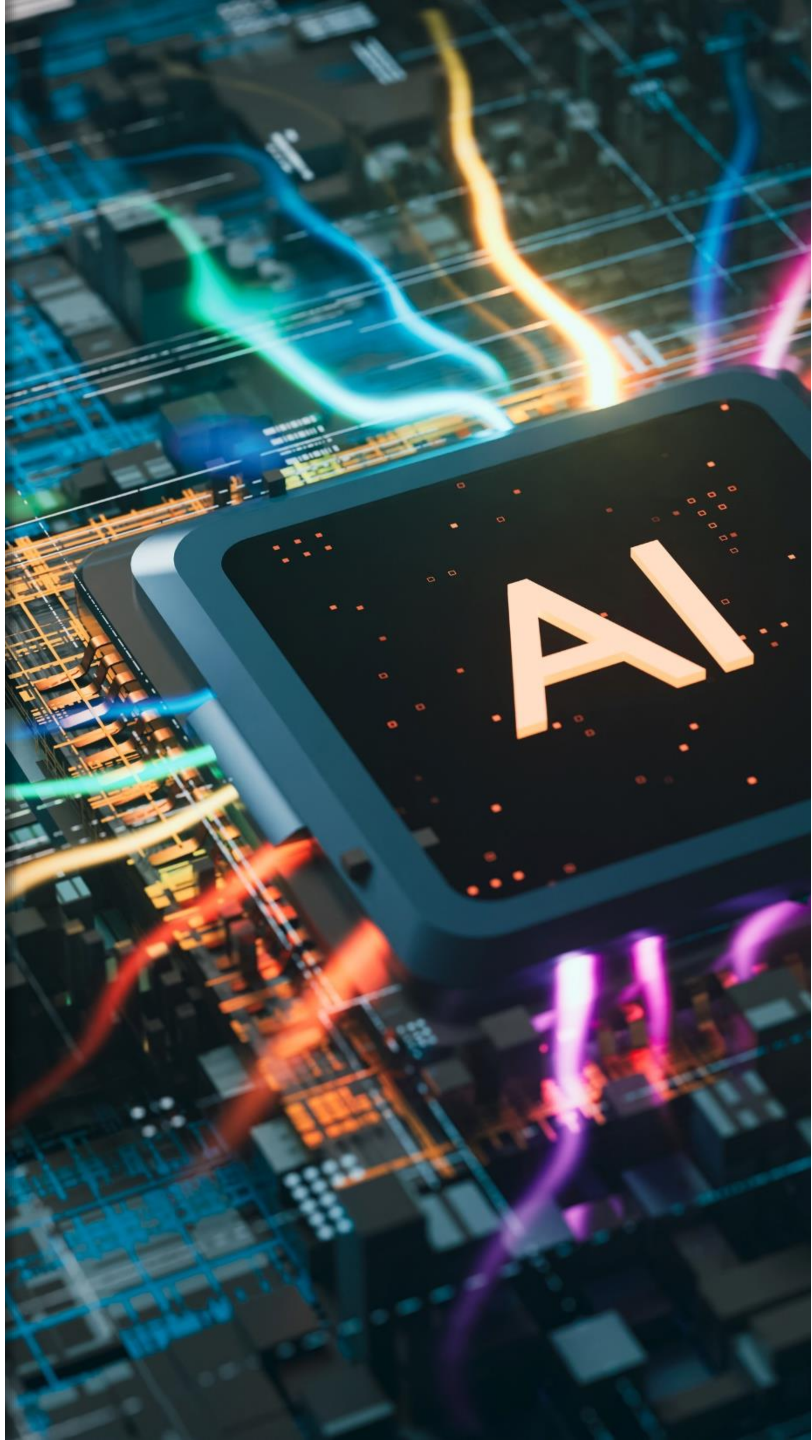
However, we asked Scandinavian consumers whether they would be less inclined to listen to music if they knew that it was produced using Gen AI.

The picture is muddy, but interestingly, 40% are less inclined to listen to music created by Gen AI.

Attitude toward music created by Gen AI

To what extent do you agree or disagree with the following statement: "I would be less inclined to listen to music if I knew it was produced using Generative AI"?





Heaven for students?

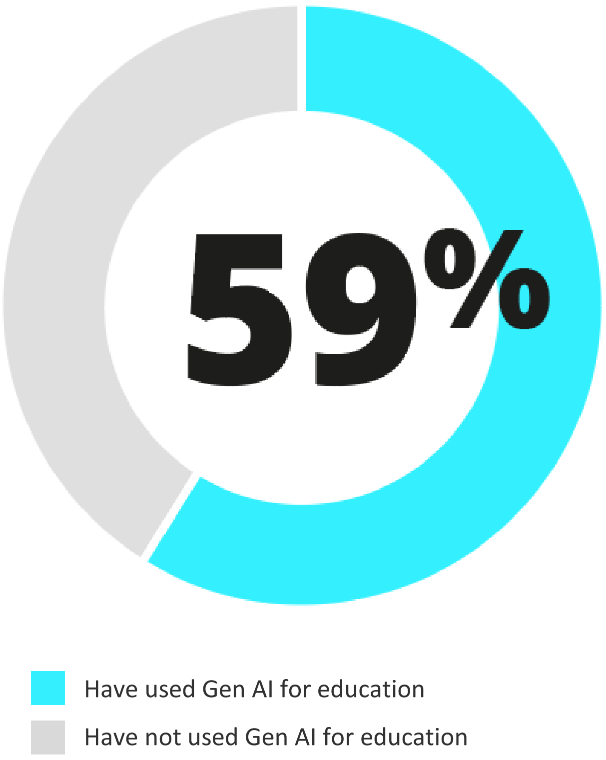
While companies are trying to find ways of using Gen AI, and the creative use of Gen AI is already being challenged in some courts of law, students are one of the groups most obviously benefitting from the technology. They now have a brand-new tool for gathering and summarising large amounts of complex information.

Scandinavian students know this already, and in our 2023 survey more than half of all students who have tried Gen AI have used it for their studies.

Since Gen AI can be an easy shortcut to searching for information or even writing assignments, educational institutions will need to provide guidance to students on its use – and many are already doing so.

Study-related use of Gen AI

Which of the following purposes have you used any Generative AI for? (Multiple choice question)



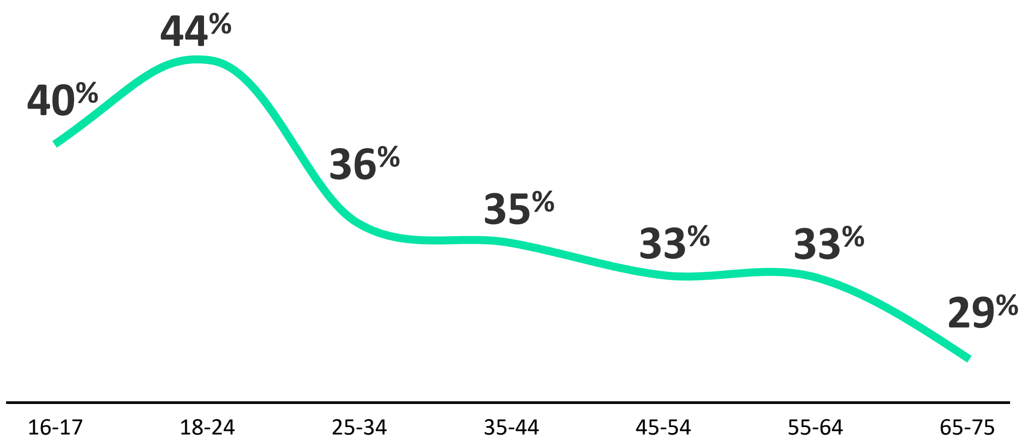
The impact of Gen AI

While many Scandinavians are experimenting with Gen AI, at school, at home or at work, many are still just thinking about it.

In general, young people are more in favour of it (44% of Scandinavians aged 18-24 are positive). Older generations are also warming to Gen AI, for example with 30% of Scandinavians aged 65-75 having a positive attitude towards it.

Positive attitude towards Gen AI: Age

On balance, are you positive or negative about Generative AI, or are your views neither positive nor negative? (The figure shows the respondents who chose "Very positive" or "Fairly positive")



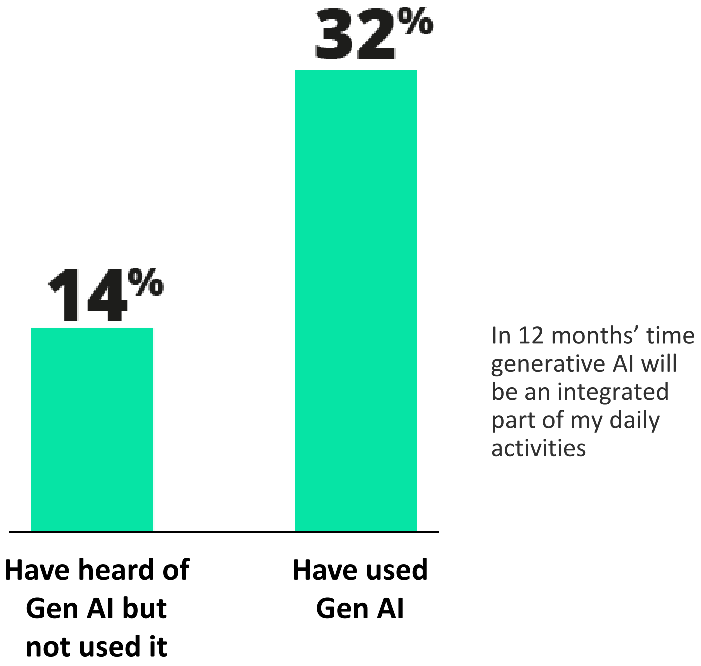
Integrating Gen AI into everyday life

What is certain is that over time most people will be affected by Gen AI in one way or another – from outsourcing labour and changing professional roles to human-machine interaction, the trustworthiness of digital content and all the ethical concerns that come with it. Scandinavians seem to realise this.

32% of those who have already used Gen AI believe that it will be an integrated part of their daily activities over the next 12 months – and even 14% of Scandinavians who have not yet used Gen AI believe the same.

Integrating Gen AI into everyday life

To what extent do you agree or disagree with the following statement: "In 12 months' time generative AI will be an integrated part of my daily activities"?
(The figure shows the respondents who chose "Strongly agree" or "Tend to agree")



Willingness to pay for Gen AI

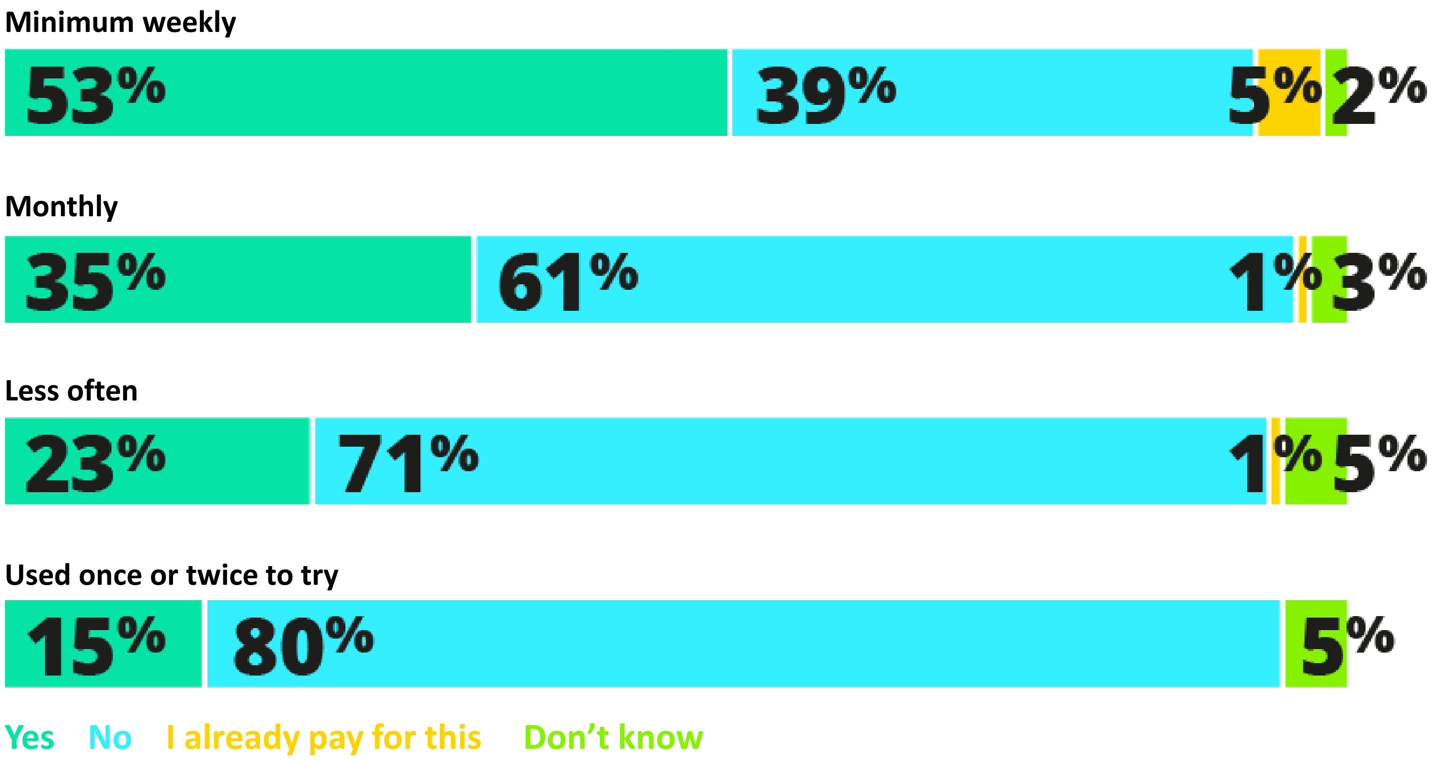
Most Gen AI tools are free, but there is a charge for some, especially for premium versions with added features or unlimited usage.

Some form of subscription for personal use of Gen AI might also be charged the future.

Our 2023 survey found that many users would be willing to pay for access to Gen AI, particularly those who are currently using it the most.

Willingness to pay for Gen AI: Frequency of use

Would you be willing to pay, for a Generative AI tool, which is available at peak times, and gives faster responses?



Chapter 3

Smartphone overuse remains high in Scandinavia

The overuse of smartphones has already become part of the political debate about mental well-being. But will devoted Scandinavians be able to change their habits? Our 2023 Digital Consumer Survey suggests: No.

Key highlights

Smartphone overuse remains high in Scandinavia

- Smartphones continue to be an integral part of people's daily lives, and so does the overuse of these devices.
- Young Scandinavians in particular recognise that they spend too much time on their smartphones, and the excessive use of social media also persists: 35% of Scandinavians spend more than two on social media each day.
- Despite their huge popularity, preferences for using small screens for online activities appear to have reached some kind of plateau. Other uses of smartphones, such as for payments and identification, could still see a significant further uptake in the coming years.

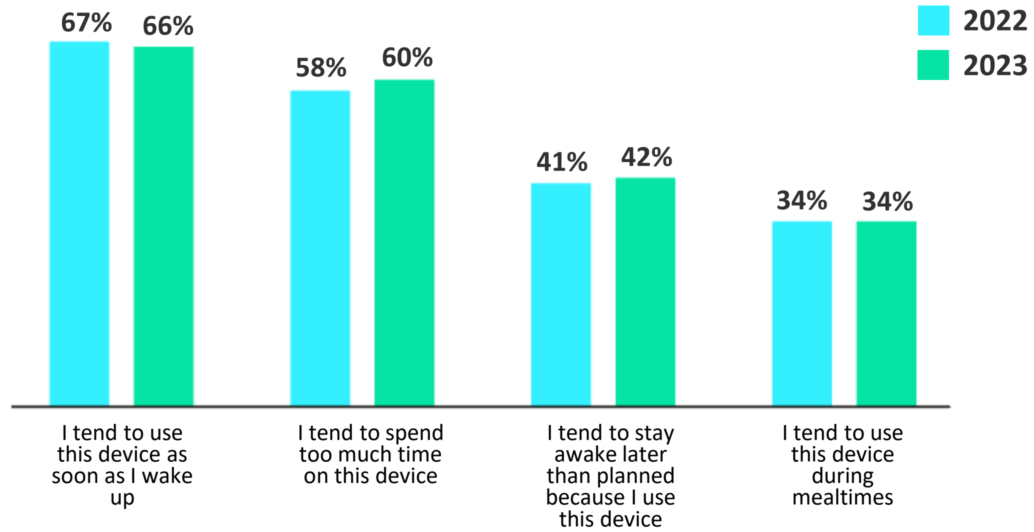
Overuse of smartphones continues among Scandinavians

60% of Scandinavians say that they spend too much time on their smartphone, 42% tend to stay awake later than planned because of using their smartphone, 34% tend to use their smartphone during meals, and 66% tend to use it as soon as they wake up.

Not surprisingly, the overuse of smartphones is driven primarily by young Scandinavians. For Scandinavians aged 16-17, 82% believe they spend too much time on their smartphone, and 77% stay up later than planned for the same reason.

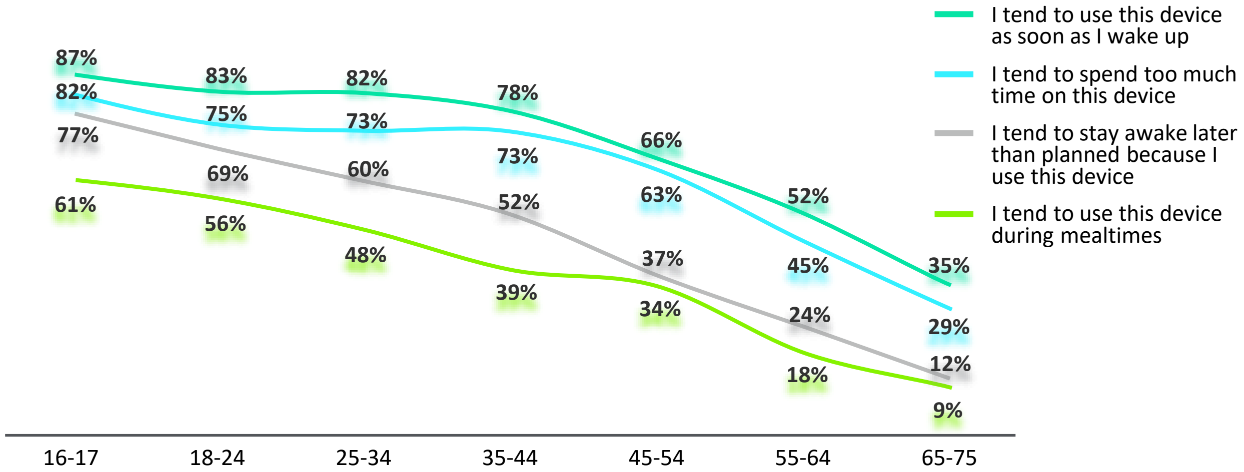
Overuse of smartphones

Thinking about the following statements, which of the following devices does it apply to, if any? (The figure shows the respondents who chose "Mobile phone") (Multiple choice question)



Overuse of smartphones: Age

Thinking about the following statements, which of the following devices does it apply to, if any? (The figure shows the respondents who chose "Mobile phone") (Multiple choice question)



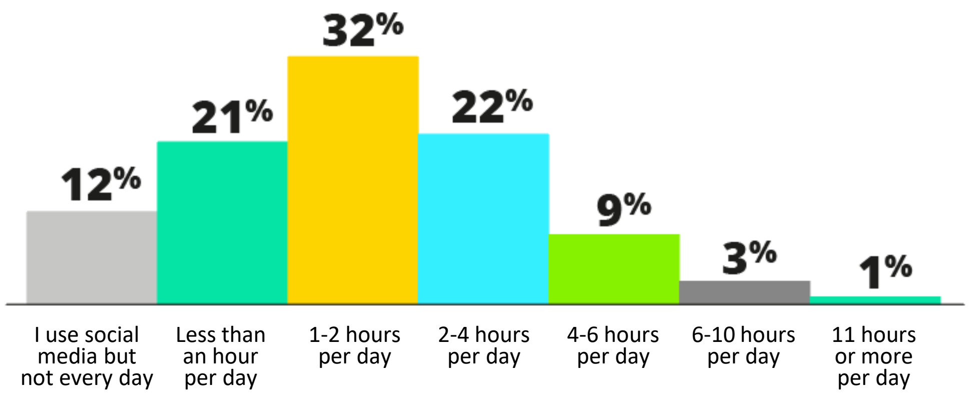
Excessive use of social media persists

35% of Scandinavians spend 2 hours or more on social media each day. This year, we again see a small proportion of Scandinavian consumers spending an excessive amount of time. 9% spend 4-6 hours a day, 3% 6-10 hours a day, and 1% a staggering 11 hours or more each day on social media.

Young people are much more likely to spend time on social media than older age groups, and 83% of 16-17 year-olds say that they spend 2 hours or more each day on social media.

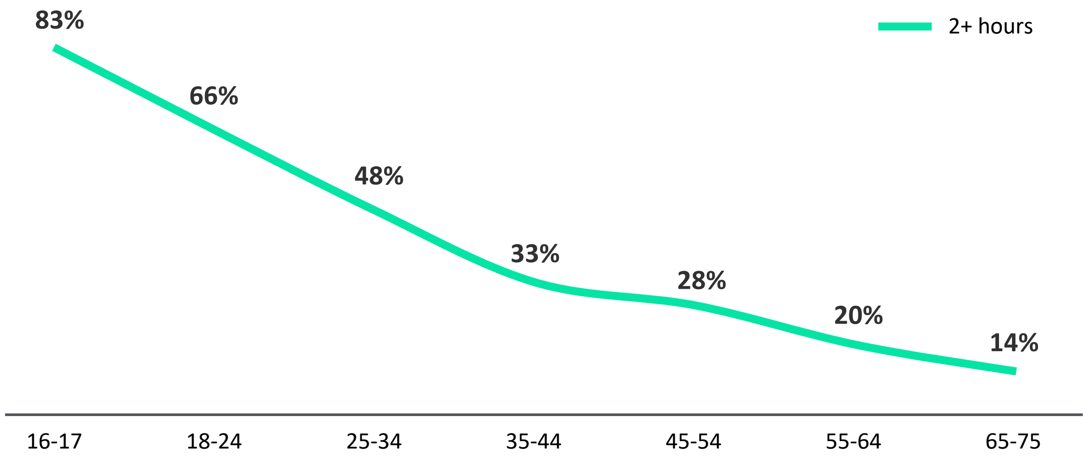
Average daily time spent on social media

On average, how much time, if at all, do you spend on social media (excluding instant messaging)?



Average daily time spent on social media: Age

On average, how much time, if at all, do you spend on social media (excluding instant messaging)?



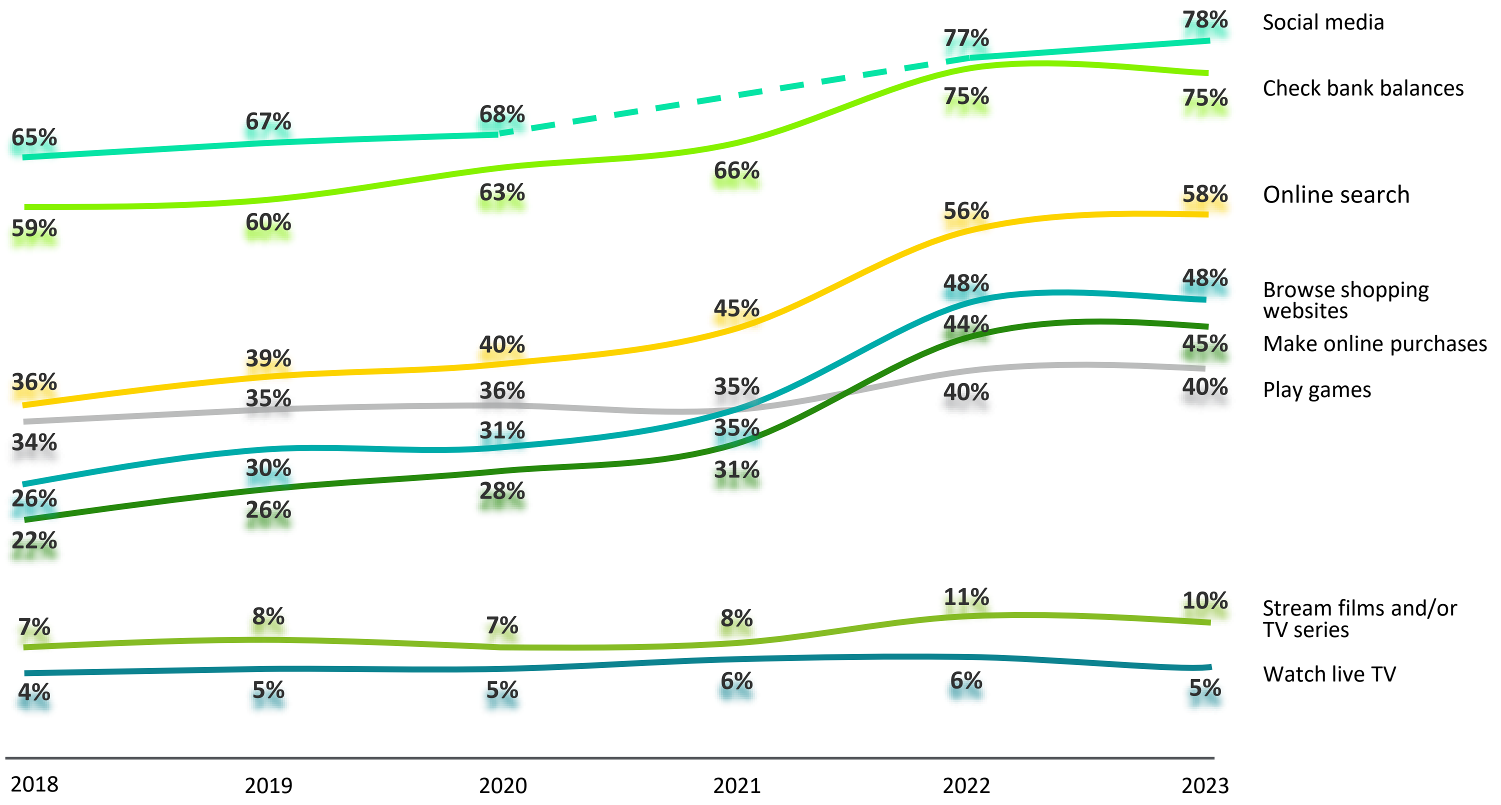
Smartphones are winning, but consoles are still in the game

Looking back over the past five years, the smartphone has grown in popularity when it comes to connecting Scandinavians with entertainment, banking, internet searching and shopping.

Across all age groups, the percentage of Scandinavian consumers who identify the smartphone as their preferred device for these activities has increased since 2018: 78% now prefer their smartphone for using social media, 75% for checking their bank balances, 58% for online search and 48% for browsing shopping websites.

Smartphones as the preferred device

Which, if any, is your preferred device for each of the following activities? (The figure shows the respondents who chose "Mobile phone") (Multiple choice question. Data for social media in 2021 is not available)



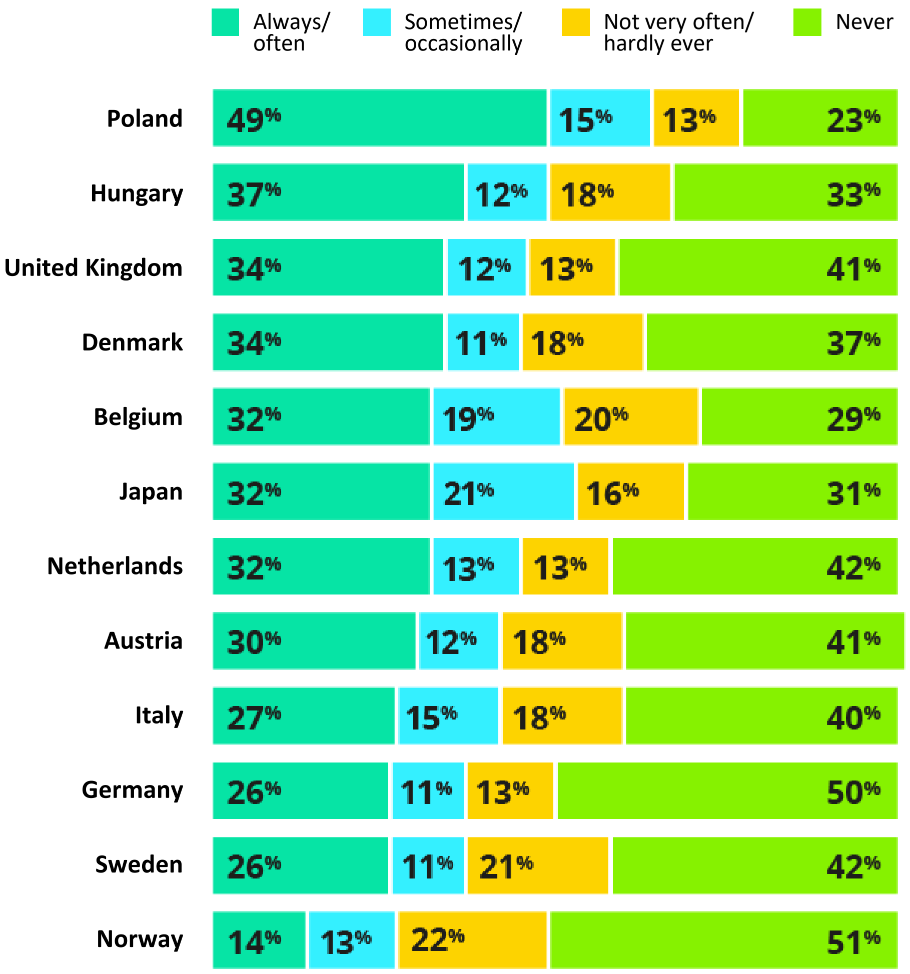
Using smartphone for payment

Today, 34% of Danish consumers use their smartphone ‘always or often’ as a payment method, compared with 26% of Swedish consumers and just 14% of Norwegian consumers.

While the Danish numbers are on a par with other European countries such as the UK and Belgium, other countries show significantly higher adoption of smartphones for payments, most notably Poland where close to half of all consumers are now frequent users of this functionality.

Frequency of smartphone payments: Country

When the option is available, how often do you use a smartphone or smartwatch (for example, using Apple Pay or Google Pay) to pay for things in person, for example in a shop or restaurant?



Driver’ licence and passport on your phone?

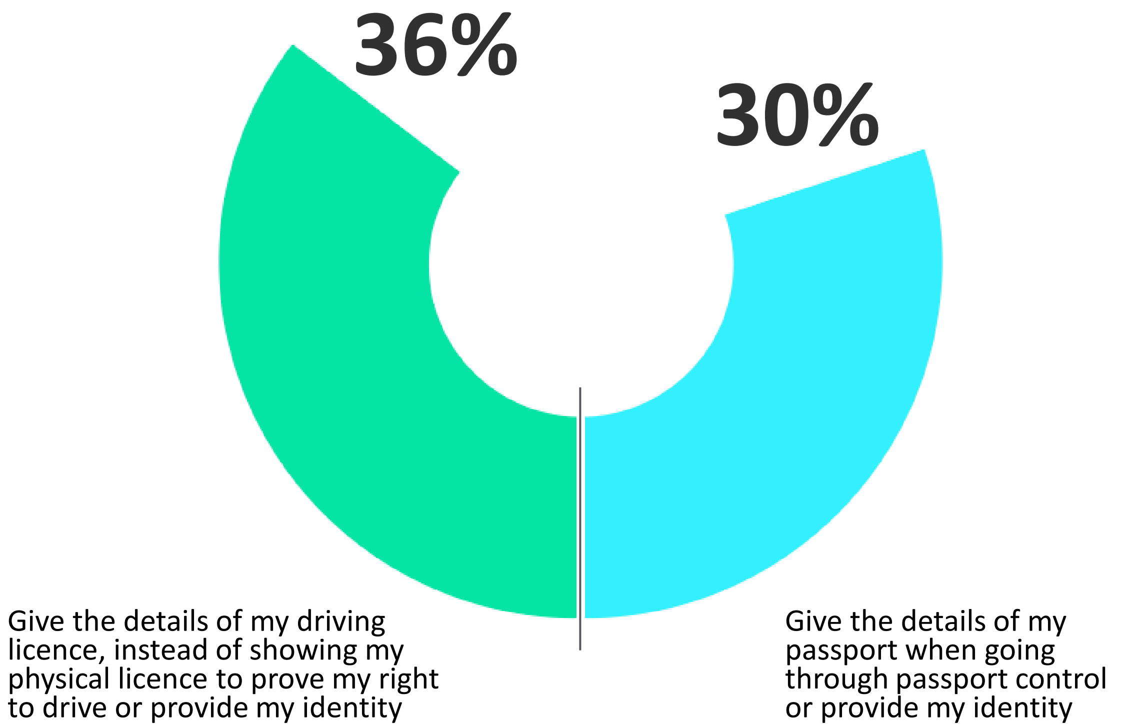
Another use of smartphones is for identification. For example, 36% of Scandinavian consumers would like to be able to use their smartphone to store their driver’s licence and 30% for storing their passport.

In Denmark, individuals can now formally store their driver’s licence and national health insurance card on their smartphone without having to carry the physical version around with them.

Most likely, the use of safe, government-verified identification technology will increase in the coming years across all of Scandinavia and beyond.

Use of smartphones for identification

Which, if any, of the following would you like to be able to use your smartphone for, instead of using other items such as physical keys, ID cards or documents? (Multiple choice question)



Chapter 4

Scandinavians are sticking with trustworthy news sources

Although a diverse news landscape encompasses all kinds of content and perspectives, Scandinavian consumers of news still focus on familiar sources that provide them with what they know and trust.

Key highlights

Scandinavians are sticking with trustworthy news sources

- TV is still the number one source of news for Scandinavian consumers overall. However, Norwegian consumers differ from Swedish and Danish consumers, preferring digital channels over traditional ones.
- Social media is still popular for staying updated, but consumers are increasingly turning towards Instagram, YouTube and TikTok, rather than Facebook.
- More than one-third of all Scandinavian consumers say that they are subjected to fake news on social media more often than 12 months ago, which shows that fake news is still a big concern.

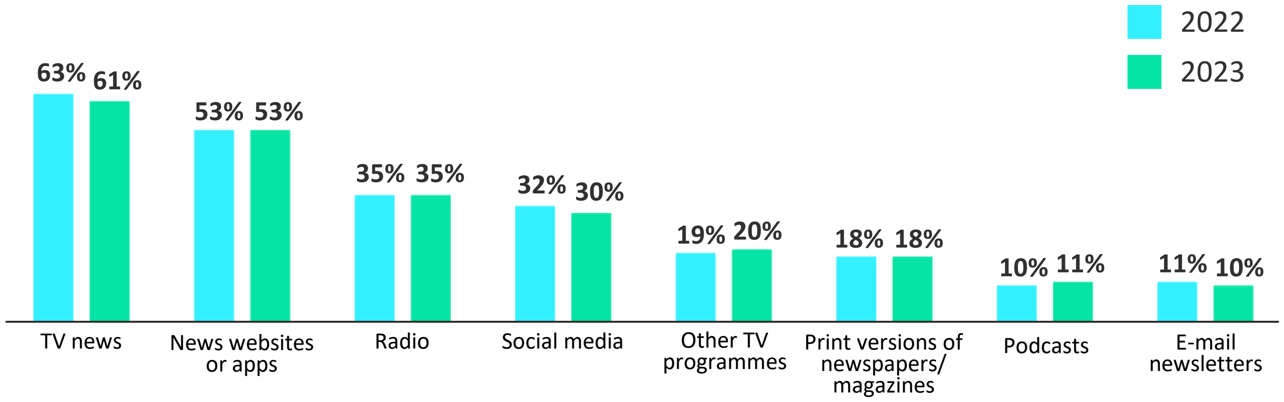
TV is still the number one source of news

Scandinavian consumers are not showing any significant changes in preferences when it comes to news consumption. 61% say that TV news is among their top three ways to stay updated, closely followed by news websites or apps, radio and social media.

Even print versions of newspapers and magazines seem to have reached a stable level, with 18% of Scandinavian consumers enjoying this traditional method of news consumption.

Preferred ways to stay updated on news and current events

Please rank the top 3 ways in which you stay updated on news or current events
(The figure shows the respondents who chose the channel as their 1st, 2nd or 3rd priority)
(Multiple choice question)

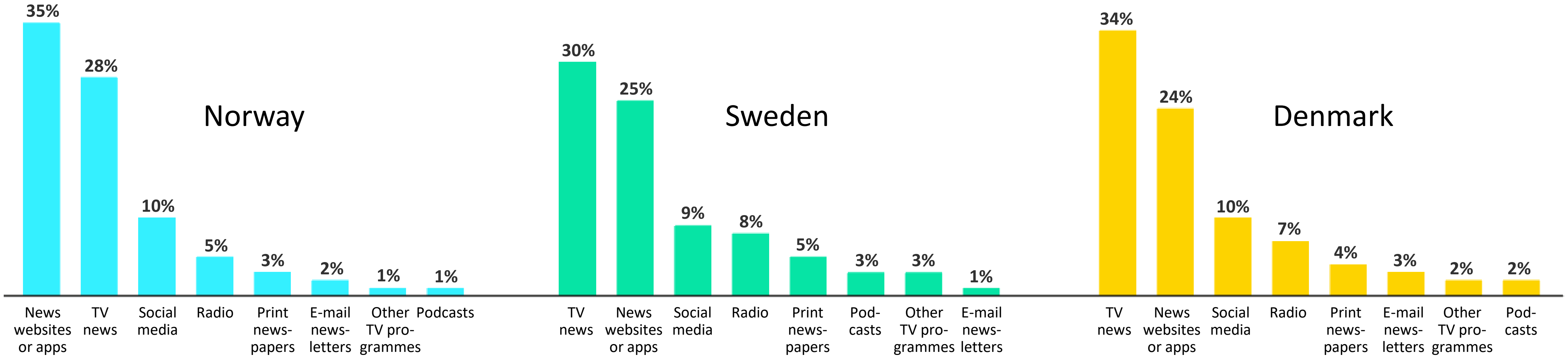


Norway prefers digital channels over traditional ones

Breaking down the numbers per country – and looking only at first priorities – some differences do appear. Most notably, we see that news websites or apps are now the preferred way to stay updated among Norwegian consumers, while TV news continues to hold first place in Sweden and Denmark.

Preferred ways to stay updated on news and current events: Country

Please rank the top 3 ways in which you stay updated on news or current events
(The figure shows the respondents' first priority) (Multiple choice question)

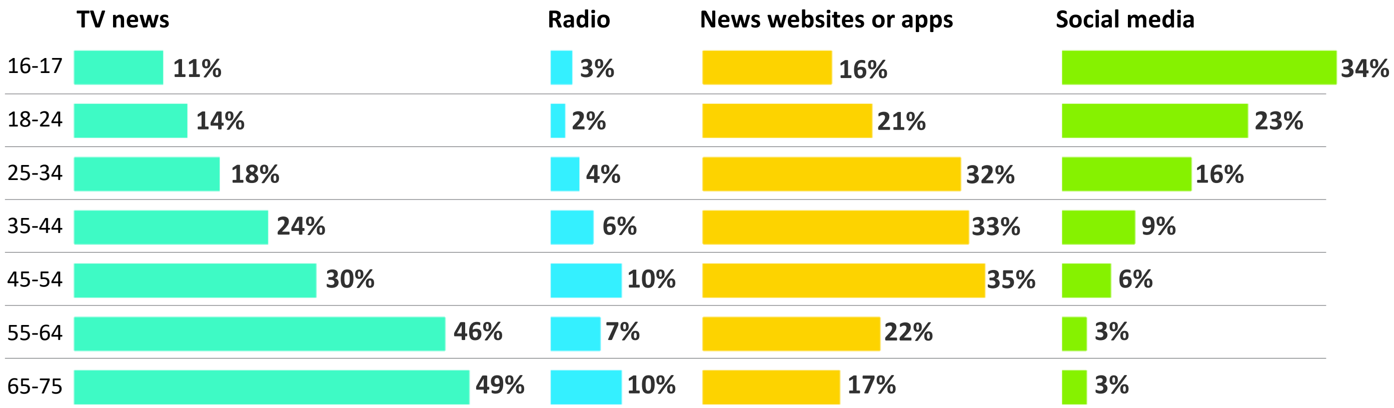


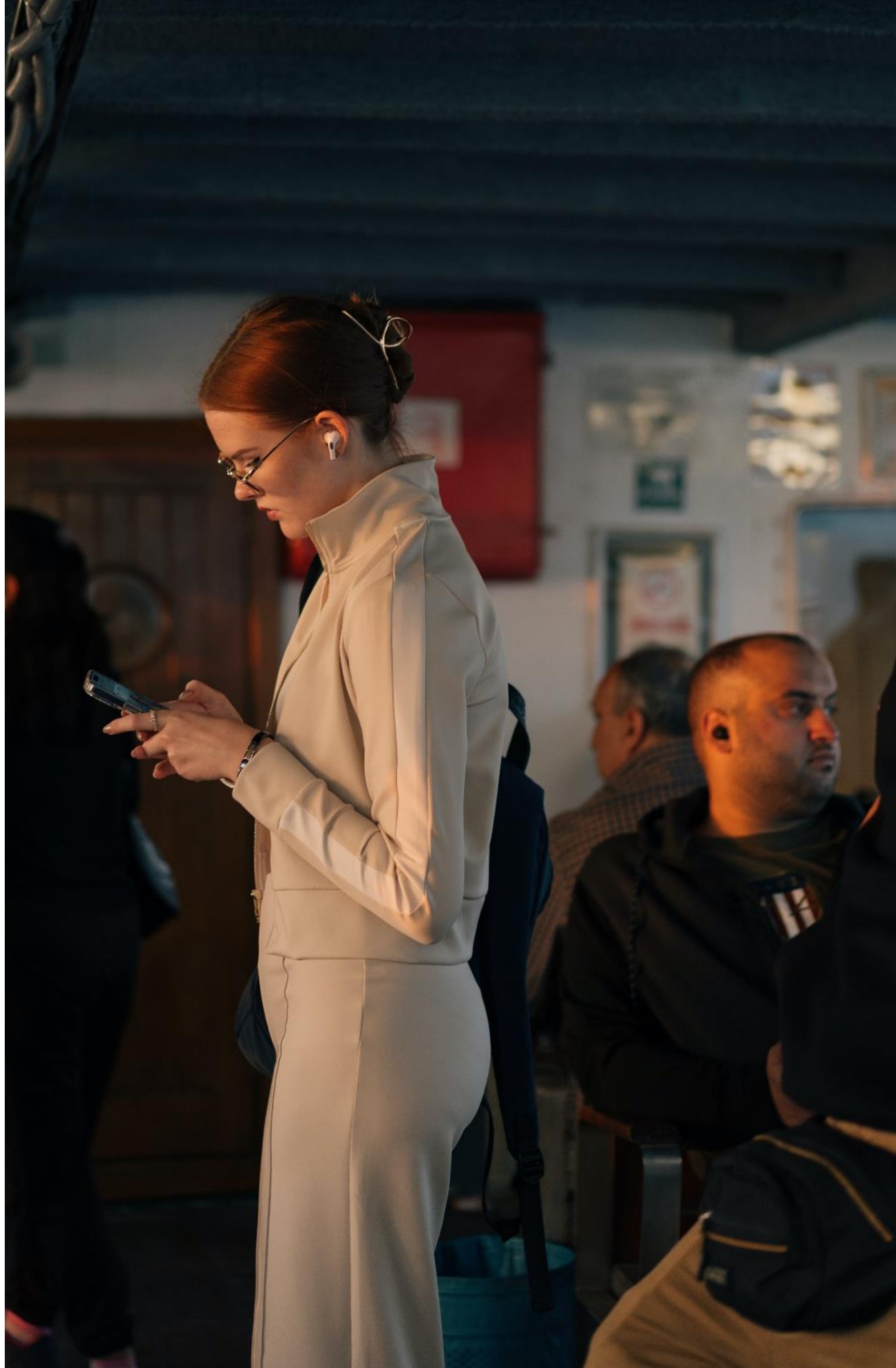
Preferences differ significantly with age

Overall, young people are more likely to get their news from social media, middle-aged consumers are more likely to prefer news websites or news apps, and older people typically prefer TV news. 34% of respondents aged 16-17 prefer to stay updated on news and current events via social media, while just 16% prefer news websites or apps, 11% TV news and only 3% radio news.

Preferred ways to stay updated on news and current events: Age

Please rank the top 3 ways in which you stay updated on news or current events
(The figure shows the respondents' first priority) (Multiple choice question)





Social media blurs the borders

On social media, the distinction between what is actual news reporting and what is user-generated content may become increasingly blurred, if not sometimes disappearing completely.

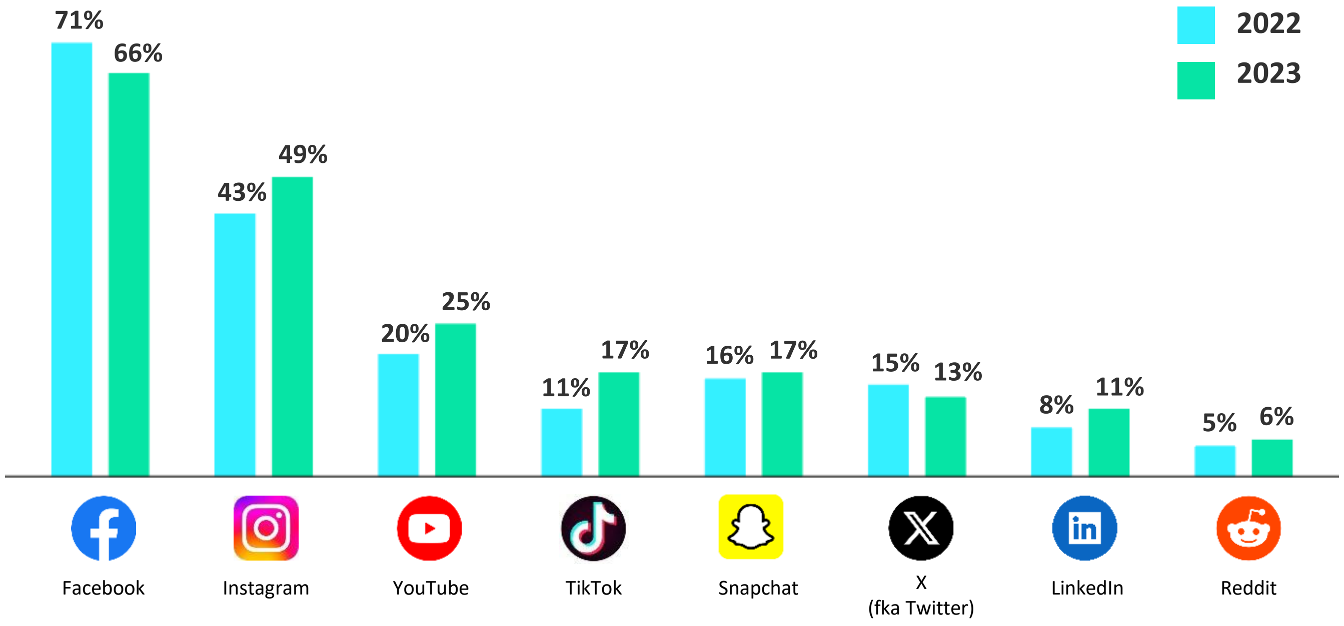
In March 2023, for example, the White House held a briefing for top social media content creators on the crisis in Ukraine to provide them with factual and timely information to share with their audiences.[1] This was clearly a sign of how influential creators can be for the flow of information.

Facebook is still the number one preferred social media platform to stay updated on news and current events for Scandinavians. However, many users are looking for alternatives. X, formerly known as Twitter, has also been affected with a 2 percentage points drop from 2022 to 2023.

Preferred social media platforms to stay updated on news and current events

Which social media platforms are your most preferred to stay updated on news or current events?

(Multiple choice question (up to three))



[1] *https://www.cbsnews.com/news/ukraine-russia-tiktok-white-house/*

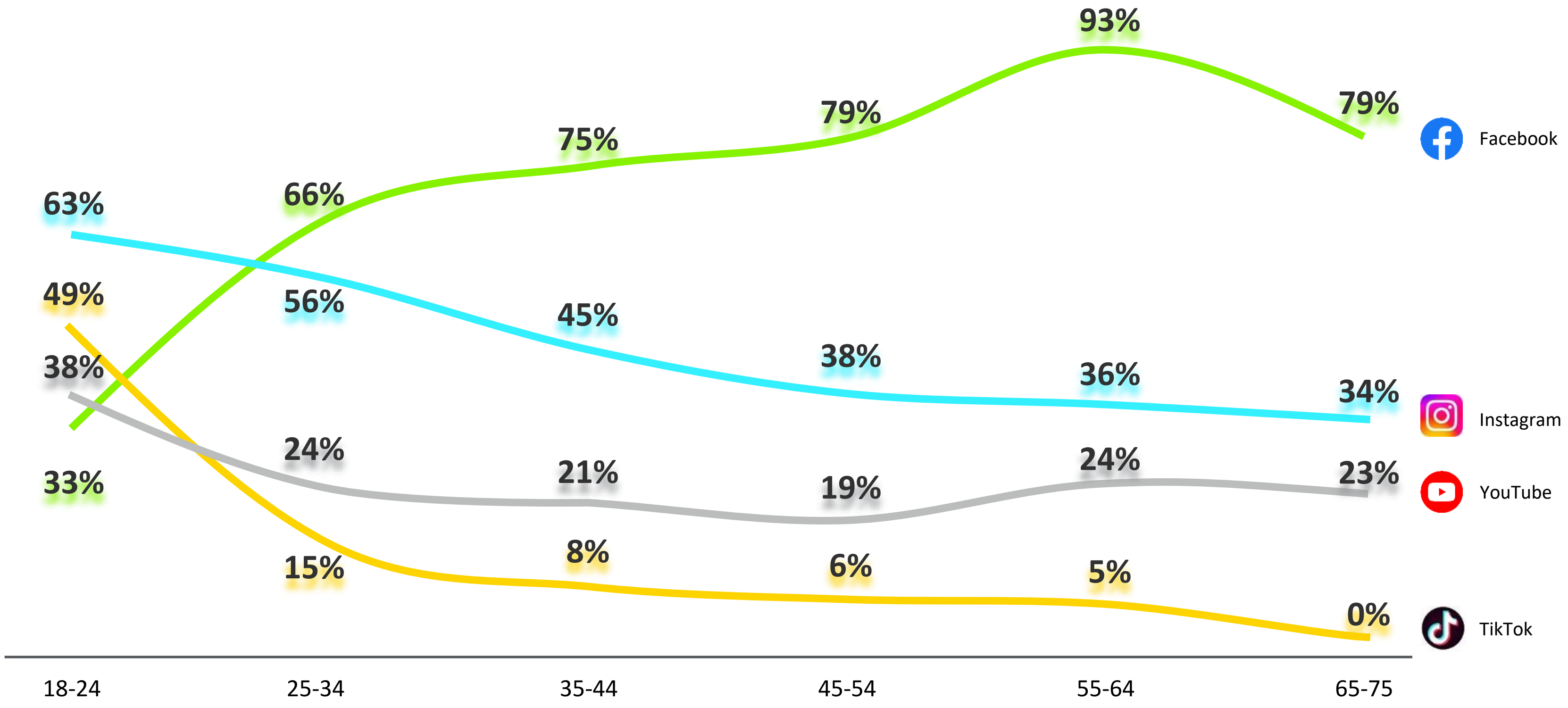
Young audiences prefer to get updated through Instagram, YouTube and TikTok

Instagram, YouTube and TikTok are still attracting audiences; and even the long-established platform LinkedIn is becoming increasingly popular for news consumption.

TikTok is especially successful in attracting the youngest audience and seems to have found a loyal fan base with its endless feed of short-format content.

Preferred social media platforms to stay updated on news and current events: Age

Which social media platforms are your most preferred to stay updated on news or current events? (Multiple choice question (up to three))



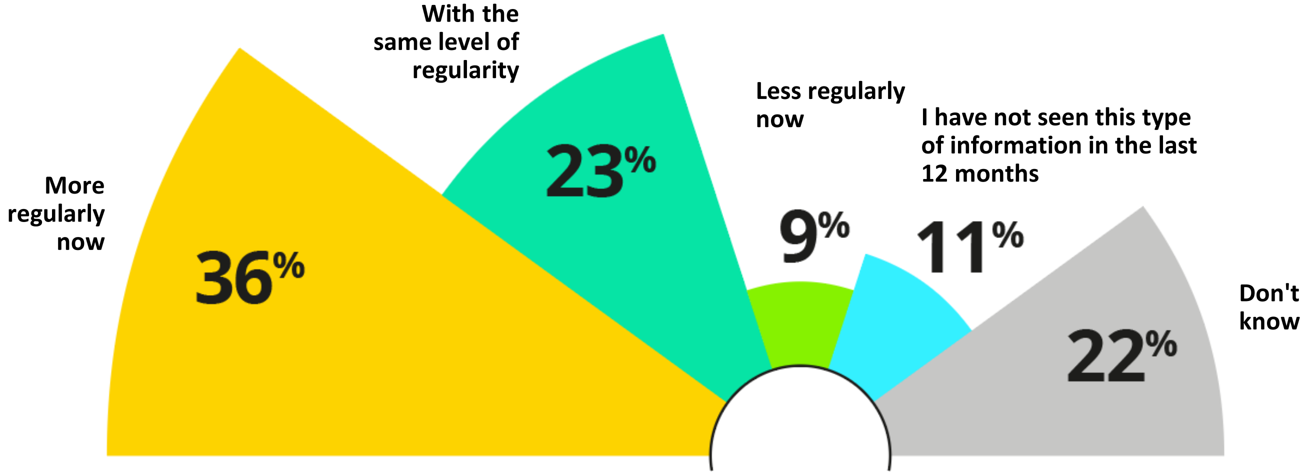
Fake news is still a concern

Today, fake news can originate from any number of sources and is typically shared across many different platforms in a matter of minutes. 36% of all Scandinavian consumers say that they are subjected to fake news on social media more often than 12 months ago.

22% of consumers say that they do not know whether they are seeing fake news on social media more often than 12 months ago. This number may indicate that many Scandinavians simply do not pay attention to, or are not able to, identify fake news.

Subjected to fake news

This question is about information that is presented to be true on social media, but is subsequently proven to be fake. For example, a doctored video, altered photo, untrue articles, misinformation, or content with misleading captions. These days, would you say you are seeing this type of information more or less regularly than you were 12 months ago or are you seeing it with the same level of regularity?



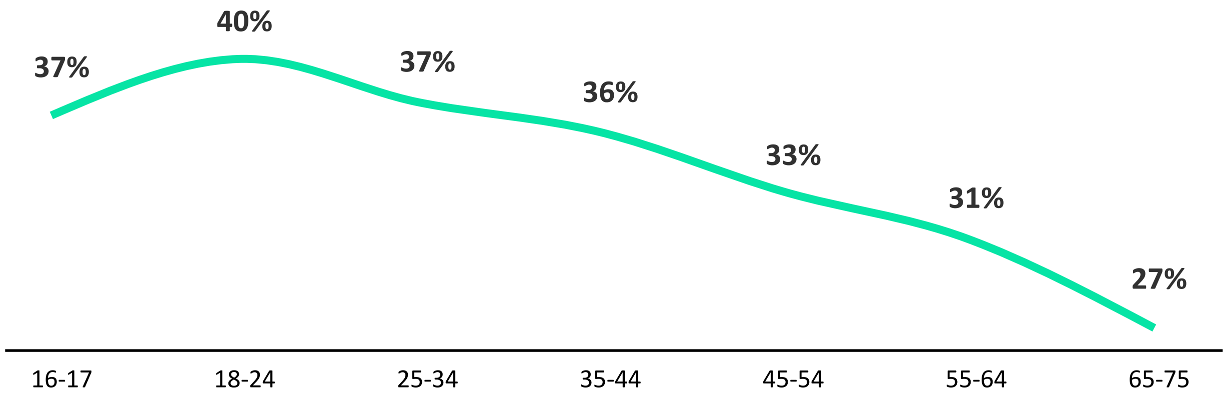
Young audiences are more exposed to fake news

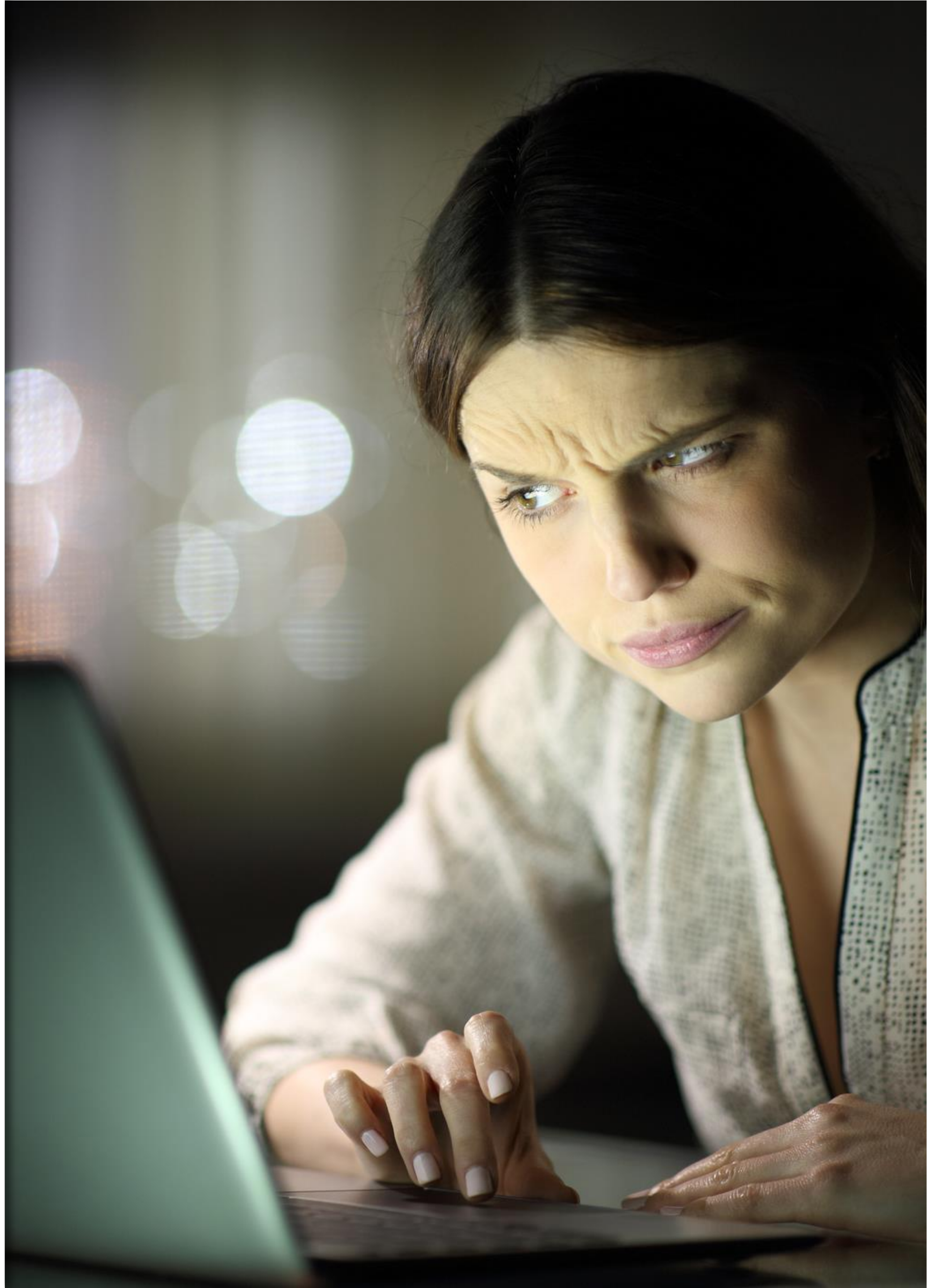
Young audiences in particular are subjected to fake news given that they are typically heavy users of social media and also consume large amounts of short video formats in which fake news can be easily disseminated globally.

40% of digital consumers aged 18-24 say they see fake news more regularly than 12 months ago (or have become better at recognising fake news when they see it). This is the highest percentage among all age groups.

Subjected to fake news: Age

This question is about information that is presented to be true on social media, but is subsequently proven to be fake. For example, a doctored video, altered photo, untrue articles, misinformation, or content with misleading captions. These days, would you say you are seeing this type of information more or less regularly than you were 12 months ago or are you seeing it with the same level of regularity?
(The figure shows the respondents who chose "More regularly now" or "A little more regularly now")





Bases

Chapter 1: Streaming providers have moved from challengers to challenged

Slide 5: Base: All adults 18-75. Base size: 2021 (n=2,001) 2022 (n=2,003) 2023 (n=1,981).

Slide 6: Base: All adults 16-75. Base size: 16-17, 2023 (n=76) 18-24, 2021 (n=2,049) 2022 (n=2,039) 2023 (n=231) 25-34, 2021 (n=3,072) 2022 (n=3,056) 2023 (n=379) 35-44, 2021 (n=353) 2022 (n=356) 2023 (n=374) 45-54, 2021 (n=378) 2022 (n=390) 2023 (n=376) 55-64, 2021 (n=314) 2022 (n=336) 2023 (n=359) 65-75, 2021 (n=335) 2022 (n=326) 2023 (n=300).

Slide 7: Base: All adults 18-75. Base size: Norway, 2021 (n=503) 2022 (n=503) 2023 (n=499) Sweden, 2021 (n=953) 2022 (n=954) 2023 (n=941) Denmark, 2021 (n=545) 2022 (n=546) 2023 (n=541).

Slide 8: Base: All adults 18-75. Base size: 2021 (n=4,000) 2022 (n=4,000) 2023 (n=3,994).

Slide 9: Base: All adults 18-75. Base size: Norway, 2022 (n=1,000) 2023 (n=999) Sweden, 2022 (n=1,908) 2023 (n=1,995) Denmark, 2022 (n=1,092) 2023 (n=1,000) Netherlands, 2022 (n=2,000) 2023 (n=2,000) United Kingdom, 2022 (n=4,011) 2023 (n=4,000) Italy, 2022 (n=2,000) 2023 (n=2,000) Austria, 2022 (n=1,000) 2023 (n=1,000) Germany, 2022 (n=2,000) 2023 (n=2,000) Belgium, 2022 (n=2,000) 2023 (n=2,000) Japan, 2022 (n=2,000) 2023 (n=2,000).

Slide 10: Base: All adults 16-75. Base size: 16-17, 2023 (n=131) 18-24, 2022 (n=487) 2023 (n=473) 25-34, 2022 (n=752) 2023 (n=790) 35-44, 2022 (n=709) 2023 (n=712) 45-54, 2022 (n=758) 2023 (n=760) 55-64, 2022 (n=651) 2023 (n=689) 65-75, 2022 (n=644) 2023 (n=645).

Slide 11: Base: All adults 18-75. Base size: 2021 (n=4,000) 2022 (n=4,000) 2023 (n=3,994).

Slide 12: Top (Base: All adults 18-75. Base size: 2021 (n=4,000) 2022 (n=4,000) 2023 (n=4,069).) Bottom (Base: All adults 16-75. Base size: 16-17, 2023 (n=131) 18-24, 2023 (n=473) 25-34, 2023 (n=790) 35-44, 2023 (n=712) 45-54, 2023 (n=760) 55-64, 2023 (n=689) 65-75, 2023 (n=645).

Slide 13: Base: All adults 18-75. Base size: Norway (n=999) Sweden (n=1,905) Denmark (n=1,090).

Slide 14: Base: All adults 18-75. Base size (Netflix, Viaplay, HBO Max, Disney+, Prime Video, C More, Discovery+, YouTube Premium: 2018 (n=2,074) 2019 (n=2,071) 2020 (n=2,071) 2021 (n=2,092) 2022 (n=2,092) 2023 (n=2,089). (TV Play DK): 2021 (n=1,092) 2022 (n=1,092) 2023 (n=1,090). (TV Play NO): 2021 (n=1,000) 2022 (n=1,000) 2023 (n=999).

Slide 15: Left (Base: All adults 18-75 who have access to this paid video subscription service and did not answer "Do not know". Base size: Netflix, 2023 (n=1,959) HBO Max, 2023 (n=1,287) Disney+, 2023 (n=1,177).) Right (Base: All adults 18-75 who have access to this paid video subscription service that is paid for by someone outside of their household. Base size: Netflix, 2023 (n=194) HBO Max, 2023 (n=140) Disney+, 2023 (n=147).

Slide 16: Top (Base: All adults 18-75. Base size: Norway, 2023 (n=999) Sweden, 2023 (n=1,905) Denmark, 2023 (n=1,090).) Bottom (Base: All adults 18-75. Base size (Netflix, HBO Max and Disney+): 18-24, 2023 (n=464) 25-34, 2023 (n=776) 35-44, 2023 (n=699) 45-54, 2023 (n=746) 55-64, 2023 (n=676) 65-75, 2023 (n=663). Base size (NRK TV): 18-24, 2023 (n=118) 25-34, 2023 (n=192) 35-44, 2023 (n=184) 45-54, 2023 (n=190) 55-64, 2023 (n=166) 65-75, 2023 (n=148). Base size (SVT Play and TV4 Play): 18-24, 2023 (n=222) 25-34, 2023 (n=403) 35-44, 2023 (n=353) 45-54, 2023 (n=665) 55-64, 2023 (n=331) 65-75, 2023 (n=321). Base size (DRTV): 18-24, 2023 (n=123) 25-34, 2023 (n=183) 35-44, 2023 (n=162) 45-54, 2023 (n=190) 55-64, 2023 (n=178) 65-75, 2023 (n=164).)

Slide 17: Base: All adults 18-75. Base size (music brands): 2023 (n=3,994) 2022 (n=4,000) 2021 (n=4,000). Base size (podcast/audiobook brands): 2023 (n=1,981).

Slide 18: Base: All adults 18-75 who have access to the service. Base size: SkyShowtime, 2023 (n=262) TV2Play (NO), 2023 (n=407) C More, 2023 (n=554) Viaplay, 2023 (n=1,272) TV2Play (DK), 2023 (n=358) HBO Max, 2023 (n=1,336) Netflix, 2023 (n=2,031) Discovery+, 2023 (n=580) YouTube Premium, 2023 (n=201) Spotify Premium, 2023 (n=1,818) Apple TV+, 2023 (n=256) Disney+, 2023 (n=1,226) Amazon/Prime Video, 2023 (n=408).

Chapter 2: Generative AI is all the rage

Slide 21: Left (Base: All adults 16-75. Base size: 2023 (n=4,200).) Right (Base: All adults 16-75 who have used any Generative AI tool and who did not answer "Do not know". Base size: 2023 (n=1,283).)

Slide 22: Left (Base: All adults 16-75. Base size: 16-17, 2023 (n=131) 18-24, 2023 (n=473) 25-34, 2023 (n=790) 35-44, 2023 (n=712) 45-54, 2023 (n=760) 55-64, 2023 (n=689) 65-75, 2023 (n=645).) Right (Base: All adults 16-75. Base size: Men, 2023 (n=2,120) women, 2023 (n=2,063).)

Slide 23: Base: All adults 16-75. Base size: Norway, 2023 (n=1,050) Sweden, 2023 (n=2,003) Denmark, 2023 (n=1,147).

Slide 24: Base: All adults 16-75. Base size: 2023 (n=4,200). Note: Multiple choice questions. Google Bard was not available to Scandinavian users at the time respondents were surveyed. Numbers on use is therefore not included.

Slide 25: Base: All adults 18-75. Base size: Austria, 2023 (n=1,000) Japan, 2023 (n=2,000) Norway, 2023 (n=999) Netherlands, 2023 (n=2,000) Sweden, 2023 (n=1,995) Belgium, 2023 (n=2,000) Hungary, 2023 (n=1,000) United Kingdom, 2023 (n=4,000) Germany, 2023 (n=2,000) Denmark, 2023 (n=1,000) Italy, 2023 (n=2,000) Poland, 2023 (n=2,001).

Slide 26: Base: All adults 16-75 who have used any Generative AI tool and who are in employment. Base size: 2023 (n=939).

Slide 27: Base: All adults 16-75 who have used any Generative AI tool and who are in employment. Base size: 2023 (n=1,657).

Slide 28: Base: All adults 16-75. Base size: Have heard of Gen AI but have not used it, 2023 (n=994) Have used Gen AI, 2023 (n=1,302).

Bases

Chapter 2: Generative AI is all the rage (continued)

Slide 29: Base: All adults 16-75 who have heard of AI. Base size: 2023 (n=2,295).

Slide 30: Base: All adults 16-75 who have used any Generative AI tool and who are currently studying. Base size: 2023 (n=229). Note: Multiple choice question.

Slide 31: Base: All adults 16-75 aware of any Generative AI tool. Base size: 16-17, 2023 (n=113) 18-24, 2023 (n=406) 25-34, 2023 (n=589) 35-44, 2023 (n=440) 45-54, 2023 (n=357) 55-64, 2023 (n=219) 65-75, 2023 (n=146).

Slide 32: Base: All adults 16-75. Base size: Have heard of Gen AI but not used it, 2023 (n=993) Have used Gen AI, 2023 (n=1,304).

Slide 33: Base: All adults 16-75. Base size: Minimum weekly, 2023 (n=298) Monthly, 2023 (n=235) Less often, 2023 (n=229) Used once or twice to try, 2023 (n=518).

Chapter 3: Smartphone overuse remains high in Scandinavia

Slide 36: Left (Base: All adults 18-75. Base size: 2022 (n=4,000) 2023 (n=3,994).) Right (Base: All adults 16-75. Base size: 16-17, 2023 (n=131) 18-24, 2023 (n=473) 25-34, 2023 (n=790) 35-44, 2023 (n=712) 45-54, 2023 (n=760) 55-64, 2023 (n=689) 65-75, 2023 (n=645).) Note: Multiple choice question.

Slide 37: Left (Base: All adults 18-75 who have a smartphone, use social media and did not answer "Do not know". Base size: 2023 (n=3,436).) Right (Base: All adults 16-75 who have a smartphone, use social media and did not answer "Do not know". Base size: 16-17, 2023 (n=124) 18-24, 2023 (n=441) 25-34, 2023 (n=723) 35-44, 2023 (n=645) 45-54, 2023 (n=666) 55-64, 2023 (n=559) 65-75, 2023 (n=467).)

Slide 38: Base: All adults 18-75 who have a smartphone and have not responded "Not applicable" to the given activity. Base size: Use social media, 2018 (n=3,287) 2019 (n=3,350) 2020 (n=1,675) 2022 (n=1,753) 2023 (n=1,842). Online search, 2018 (n=3,591) 2019 (n=3,594) 2020 (n=1,791) 2021 (n=1,849) 2022 (n=1,873) 2023 (n=1,956). Make online purchases, 2018 (n=3,550) 2019 (n=3,541) 2020 (n=1,750) 2021 (n=1,828) 2022 (n=1,842) 2023 (n=1,920). Stream films and/or TV series, 2018 (n=3,068) 2019 (n=3,154) 2020 (n=1,606) 2021 (n=1,702) 2022 (n=1,716) 2023 (n=1,792). Watch live TV, 2018 (n=3,121) 2019 (n=3,185) 2020 (n=1,600) 2021 (n=1,663) 2022 (n=1,693) 2023 (n=1,745). Check bank balances, 2018 (n=3,580) 2019 (n=3,576) 2020 (n=1,785) 2021 (n=1,842) 2022 (n=1,869) 2023 (n=1,949). Browse shopping websites, 2018 (n=3,523) 2019 (n=3,512) 2020 (n=1,730) 2021 (n=1,808) 2022 (n=1,838) 2023 (n=1,904). Play games 2018 (n=2,853) 2019 (n=2,941) 2020 (n=1,453) 2021 (n=1,463) 2022 (n=1,460) 2023 (n=1,534). Note: Multiple choice question. Data for social media in 2021 is not available.

Slide 39: Base: All adults 18-75 who have access to a smartphone or smartwatch and who did not answer "Do not know". Base size: Poland, 2023 (n=1,883) Hungary, 2023 (n=956) United Kingdom, 2023 (n=3,731) Denmark, 2023 (n=941) Belgium, 2023 (n=1,844) Japan, 2023 (n=1,738) Netherlands, 2023 (n=1,899) Austria, 2023 (n=953) Italy, 2023 (n=1,891) Germany, 2023 (n=1,852) Sweden, 2023 (n=1,875) Norway, 2023 (n=948).

Slide 40: Base: All adults 18-75 who have a smartphone. Base size: 2023 (n=3,836). Note: Multiple choice question.

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Slide 43: Base: All adults 18-75. Base size: 2022 (n=2,003) 2023 (n=2,013). Note: Multiple choice question.

Slide 44: Base: All adults 18-75. Base size: Norway, 2023 (n=500) Sweden, 2023 (n=964) Denmark, 2023 (n=549). Note: Multiple choice question.

Slide 45: Base: All adults 16-75. Base size: 16-17, 2023 (n=55) 18-24, 2023 (n=242) 25-34, 2023 (n=412) 35-44, 2023 (n=338) 45-54, 2023 (n=384) 55-64, 2023 (n=330) 65-75, 2023 (n=344). Note: Multiple choice question.

Slide 46: Base: All adults 18-75 who answered that social media is one of the three most preferred methods to stay updated on news or current events. Base size: 2022 (n=631) 2023 (n=612). Note: Multiple choice question (up to three).

Slide 47: Base: All adults 18-75 who answered that social media is one of the three most preferred methods to stay updated on news or current events. Base size: 18-24, 2023 (n=122) 25-34, 2023 (n=187) 35-44, 2023 (n=100) 45-54, 2023 (n=96) 55-64, 2023 (n=55) 65-75, 2023 (n=52). Note: Multiple choice question (up to three).

Slide 48: Base: All adults 18-75 who use social media. Base size: 2023 (n=3,574).

Slide 49: Base: All adults 16-75. Base size: 16-17, 2023 (n=131) 18-24, 2023 (n=473) 25-34, 2023 (n=790) 35-44, 2023 (n=712) 45-54, 2023 (n=760) 55-64, 2023 (n=689) 65-75, 2023 (n=645).