Deloitte.

Digital Consumer Trends 2024

The Scandinavian ‘cut’

About the research

The Scandinavian edition of Deloitte's 2024 Digital Consumer Trends is an annual survey capturing insights from 4,200 consumers in Sweden, Norway, and Denmark, as part of a larger global study. The global 2024 report includes 17,996 respondents across 11 countries.

The findings presented in this report are based on nationally representative samples of 16-75-year-olds: 2,100 from Sweden, 1,050 from Norway, and 1,050 from Denmark. These samples adhere to country-specific quotas on age, gender, region, and employment status. Conducted online by independent research firm Ipsos MORI in July 2024, the survey utilized a questionnaire designed by Deloitte.

Streaming is the new normal in Scandinavia

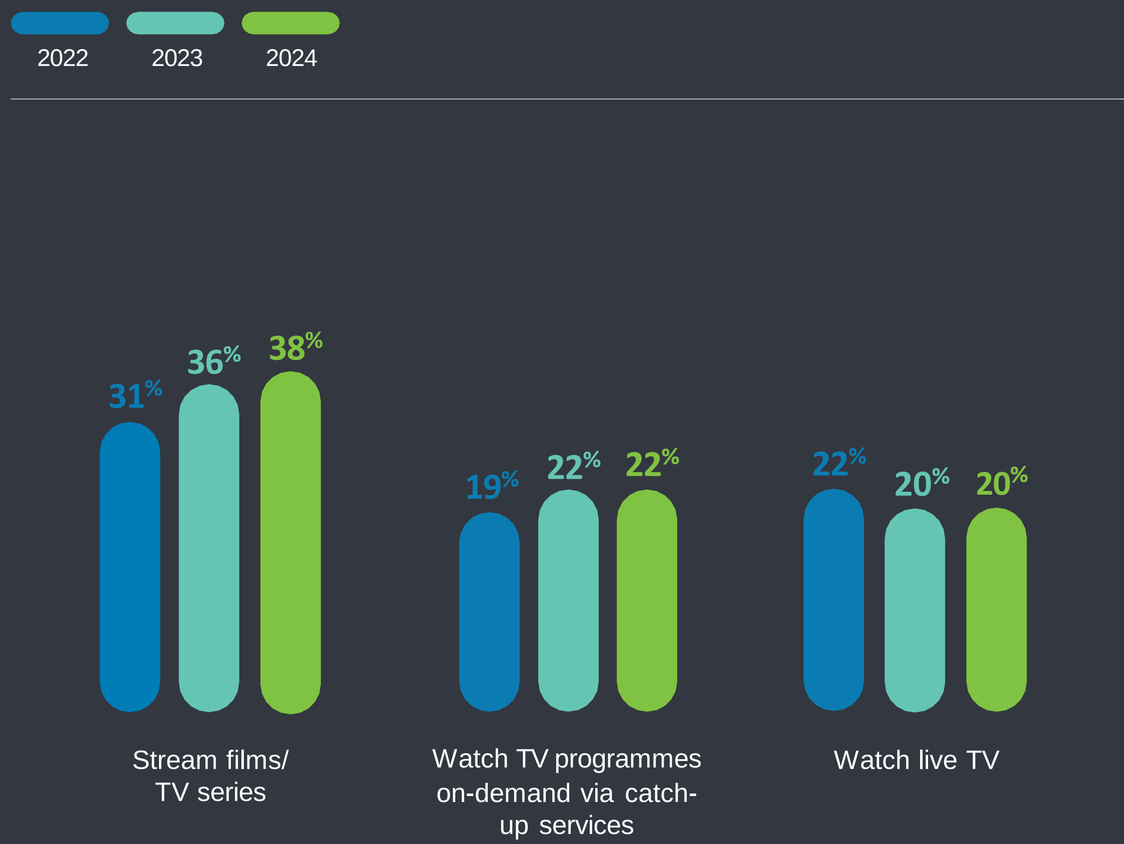
- In 2024, streaming subscriptions show clear signs of stabilizing post-pandemic.
- After peaking in 2022 and dipping in 2023, access levels have balanced out.
- Younger users remain consistent, while older audiences exhibit fluctuating interest.
- This shift reflects more sustainable habits, solidifying subscription video on demand (SVOD) as a steady component of household media budgets.

Streaming 2024: A daily habit in Scandinavian households

- In 2024, 38% of viewers stream films and TV series daily, making streaming the top choice for on-screen entertainment. This marks steady growth from 31% in 2022 and 36% in 2023.
- Watching TV programs on-demand via catch-up services has also maintained a consistent presence, with 22% of viewers using these services daily in both 2023 and 2024, up from 19% in 2022.
- Live TV has remained relatively stable from 2022 to 2024.

Daily on-screen entertainment: Yearly development

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)

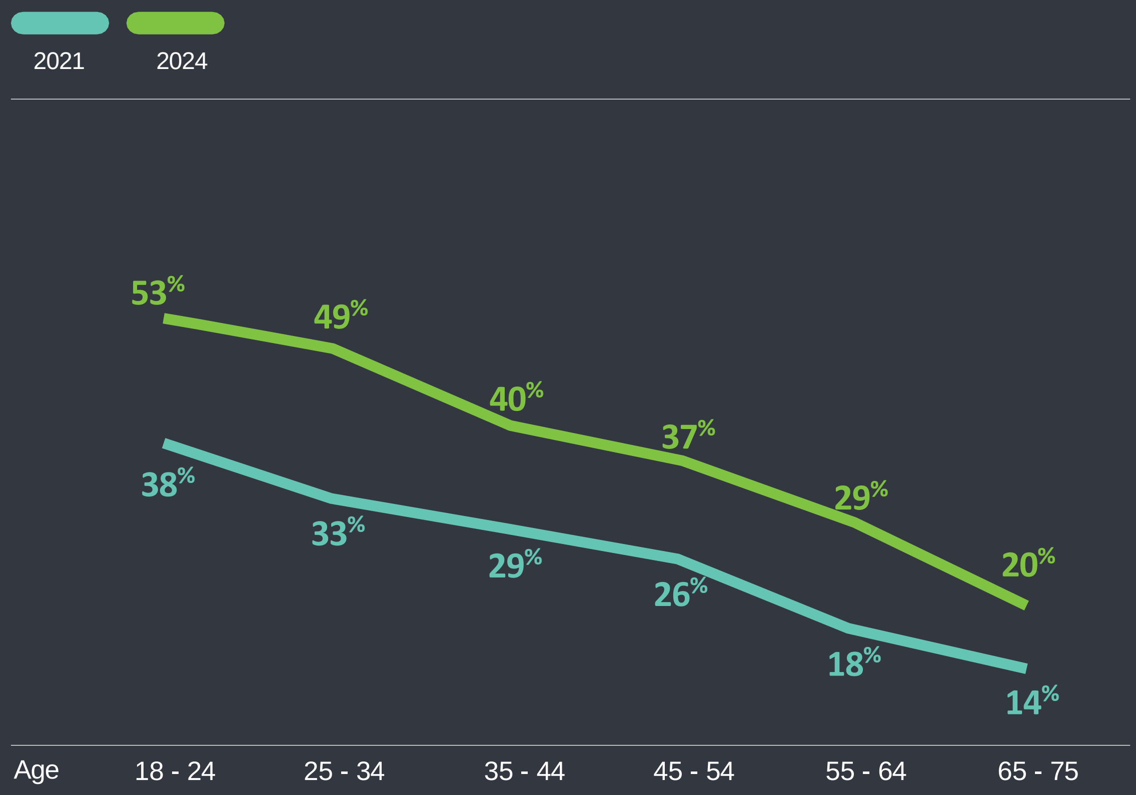


From Gen Z to Baby Boomers: Streaming reaches every generation

- Young viewers lead the streaming trend, but streaming continues to gain ground in all generations.
    - The sharpest rise is in the 25-34 demographic, which jumped from 33% in 2021 to 49% in 2024.
- Younger audiences, particularly 18-24-year-olds, lead with 53% streaming daily, while older groups show steady growth, signaling a cross-generational shift to on-demand.

Daily on-screen entertainment: 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? (Multiple choice question. The figure shows the respondents who chose "Stream films/series")

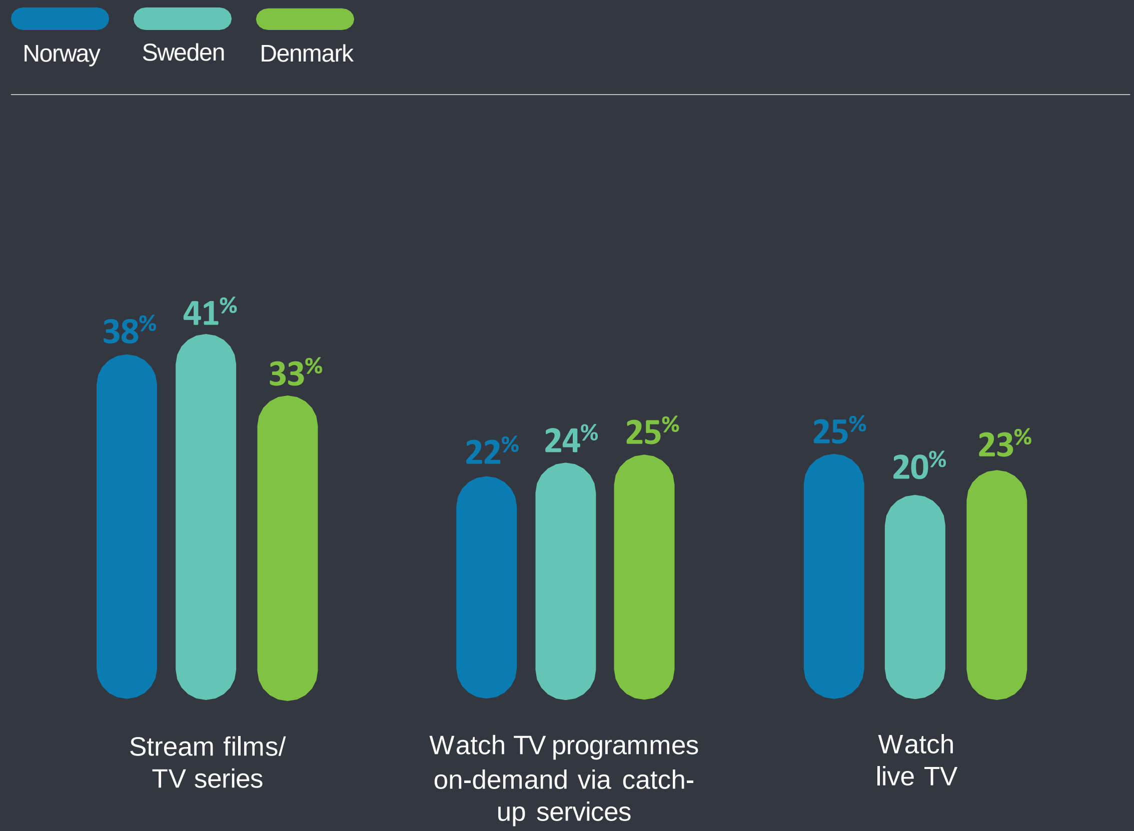


Sweden leads in daily streaming

- Regionally, Sweden shows the highest daily streaming engagement, with 41% regularly streaming films and series.
- Norway shows a more moderate viewing habit in this sense – 38% of Norwegians stream films or series daily.
- Danes have the strongest preference for watching TV programs on-demand via catch-up services.

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)

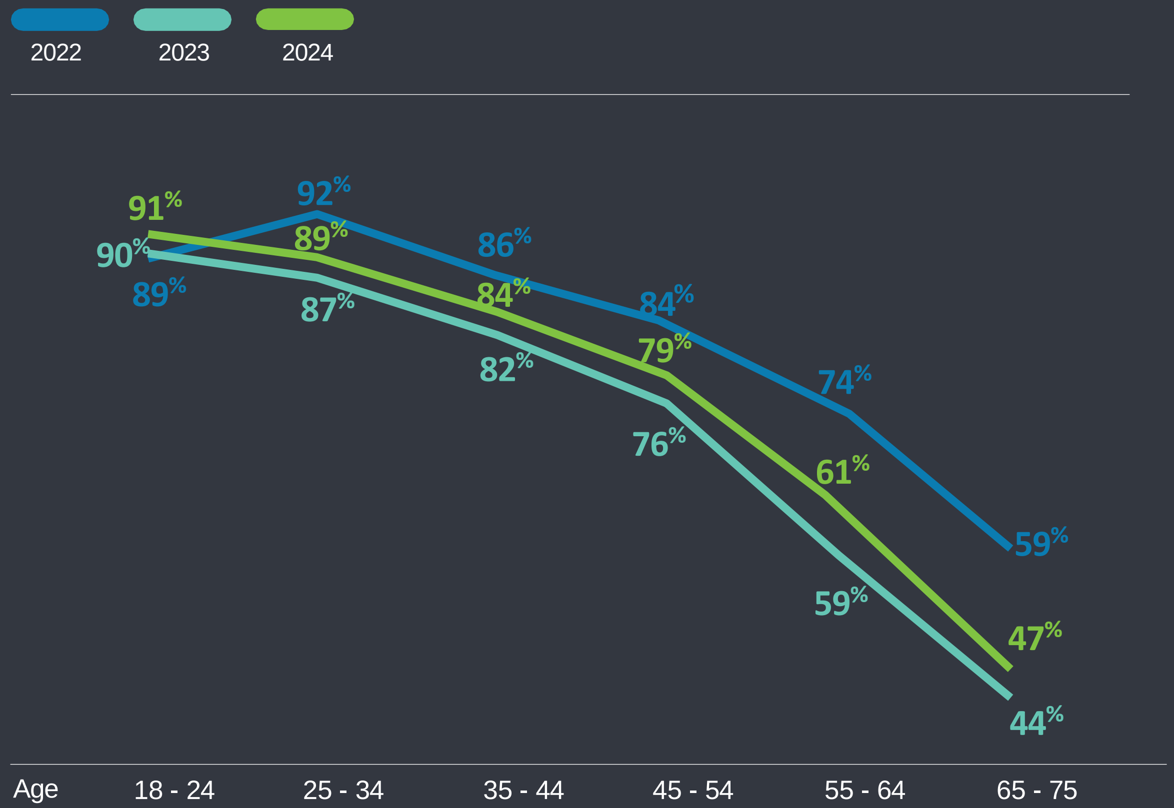


Access to streaming platforms settles into stability

- As streaming subscriptions adjust to post-pandemic life, access to SVOD (subscription video on demand) services have found a stable footing.
- Younger demographics remain steadfast in their subscriptions, while older groups show a pattern of rising interest in 2022, a dip in 2023, and partial recovery in 2024.
- This stabilization reflects a shift toward more balanced, sustainable viewing habits as households adjust their budgets for the long term, establishing SVOD as a steady, essential part of the media landscape – even if at lower-than-peak spending levels.

Access to SVOD services: Age

Which, if any, of the following digital subscription services do you have access to? (Respondents who have chosen at least one video streaming service)

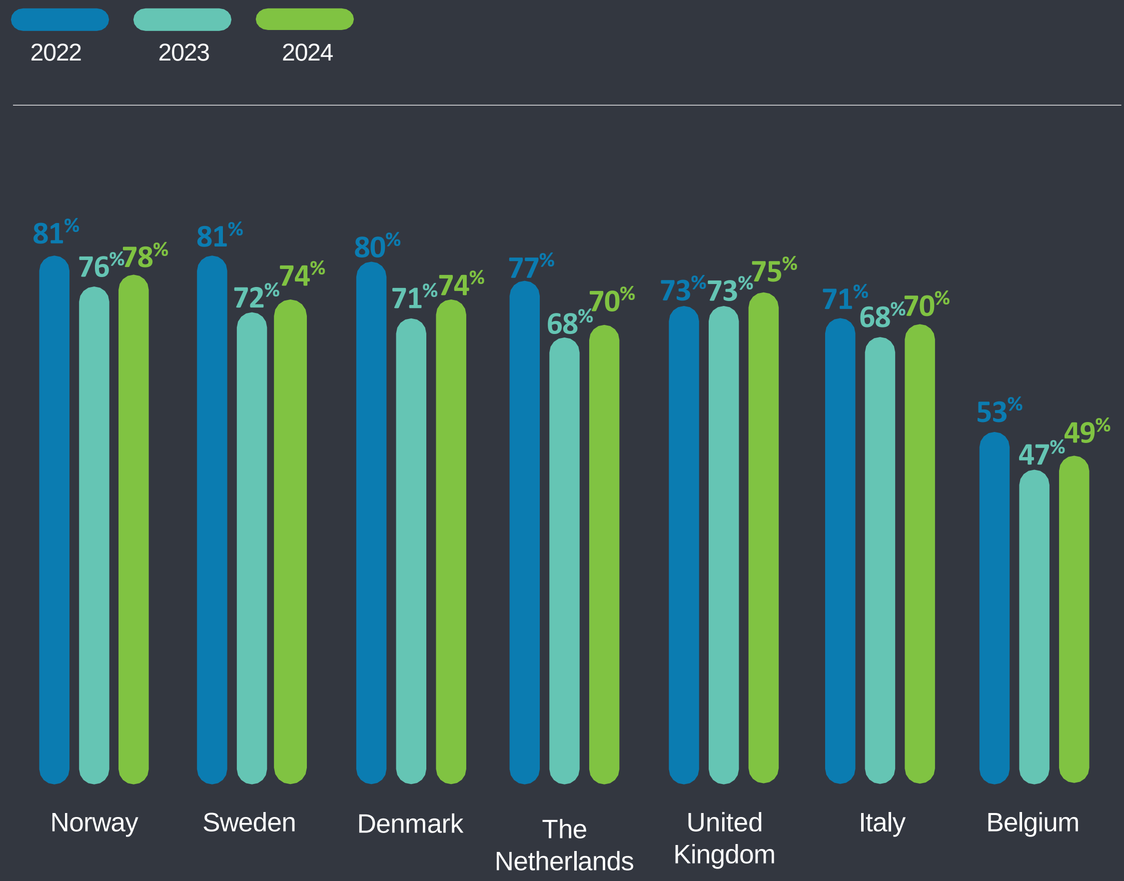


Small uptake in subscriptions, yet still below 2022 peak

- SVOD access saw a modest recovery in 2024, with Norway now leading Scandinavia at 78%, while Sweden and Denmark follow at 74%.
- Belgium remains the outlier with consistently lower levels of access to SVOD services compared to other countries. In 2022, only 53% of Belgian respondents reported access to at least one paid SVOD service, a figure that declined slightly to 47% in 2023, before reaching 49% in 2024.

Access to SVOD services: Country

Which, if any, of the following digital subscription services do you have access to? (Multiple choice question. Respondents who have chosen at least one video streaming service)

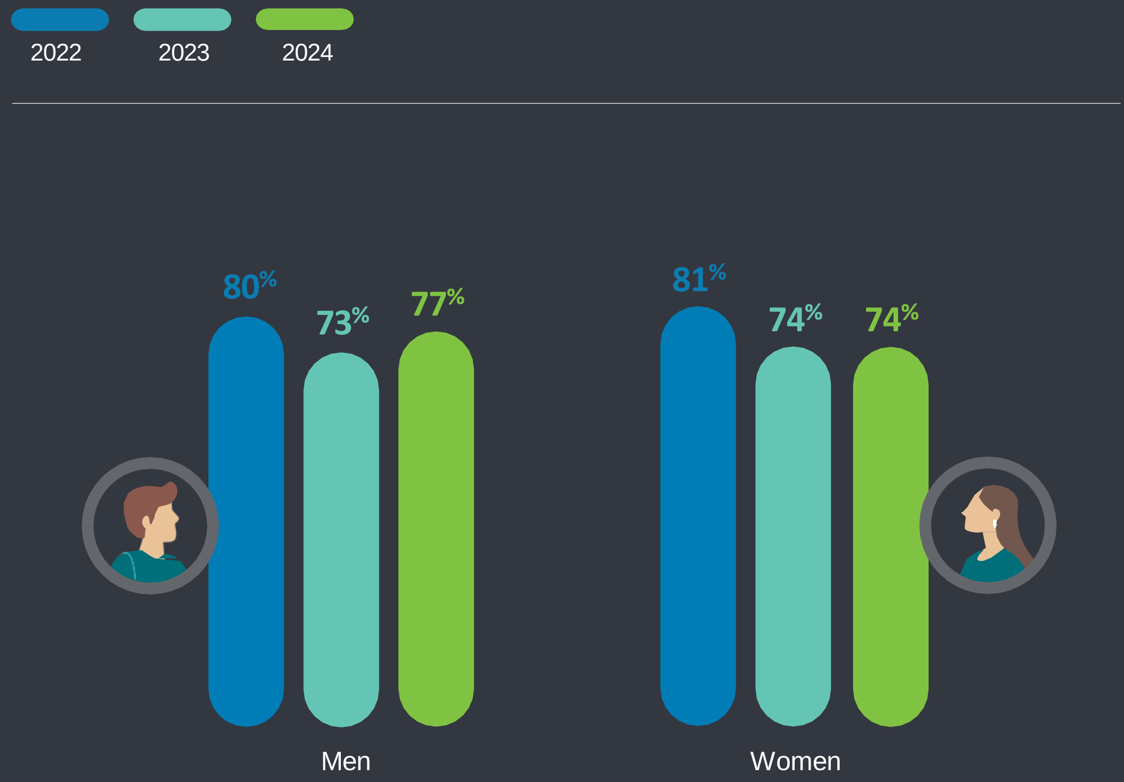


Men surpass women in access to SVOD

- Gender dynamics also shifted, as men surpassed women in SVOD access for the first time with 77% of men subscribing compared to 74% of women. These trends suggest a steady yet evolving streaming market.

Access to SVOD services: Gender

Which, if any, of the following digital subscription services do you have access to? (Multiple choice question. Respondents who have chosen at least one video streaming service)

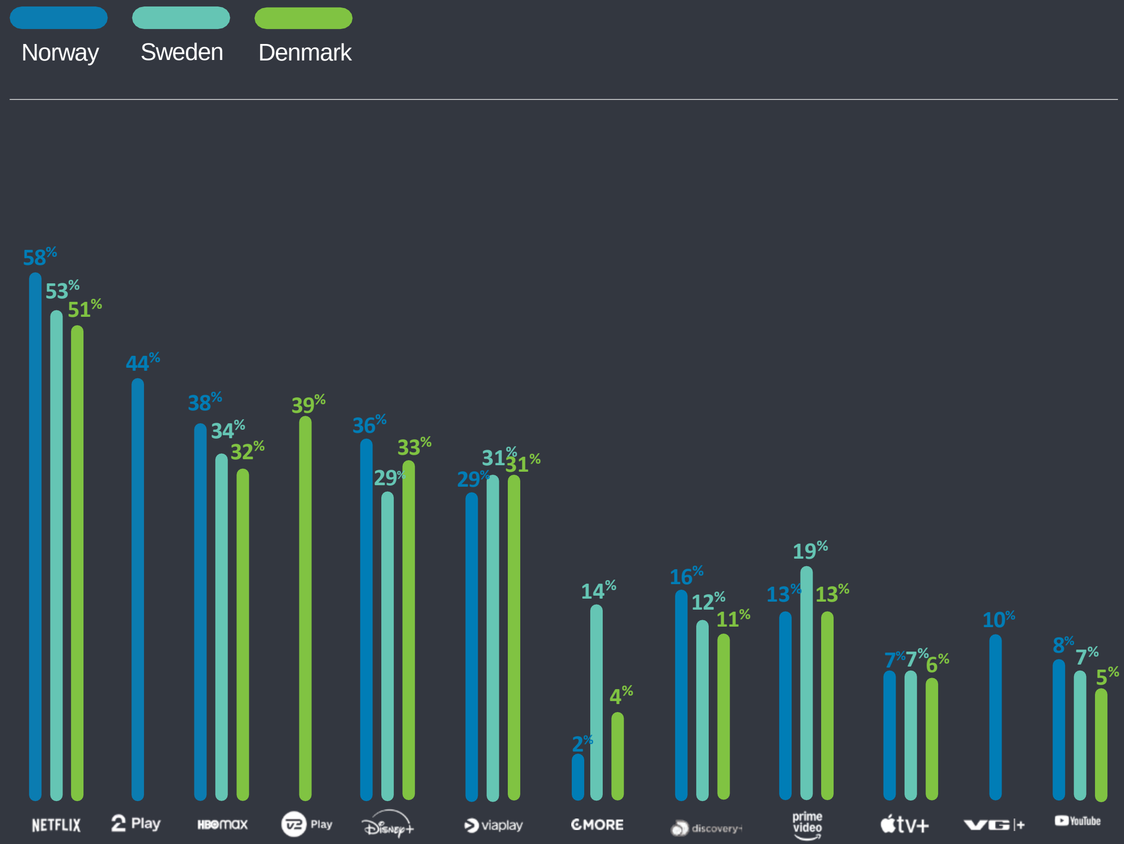


Netflix reigns, other services gain ground

- Netflix remains the clear favorite in Scandinavia, dominating the streaming market with over half of Scandinavian consumers accessing its service. Norway leads the way with 58%, followed by strong support in Sweden (53%) and Denmark (51%).
- Amazon Prime Video shows notable growth in Sweden, reaching 19% of viewers, likely driven by the availability of Amazon Prime—a subscription combining streaming, shopping, and delivery—services uniquely available in Sweden within the Scandinavian region.

Access to SVOD services: Country

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

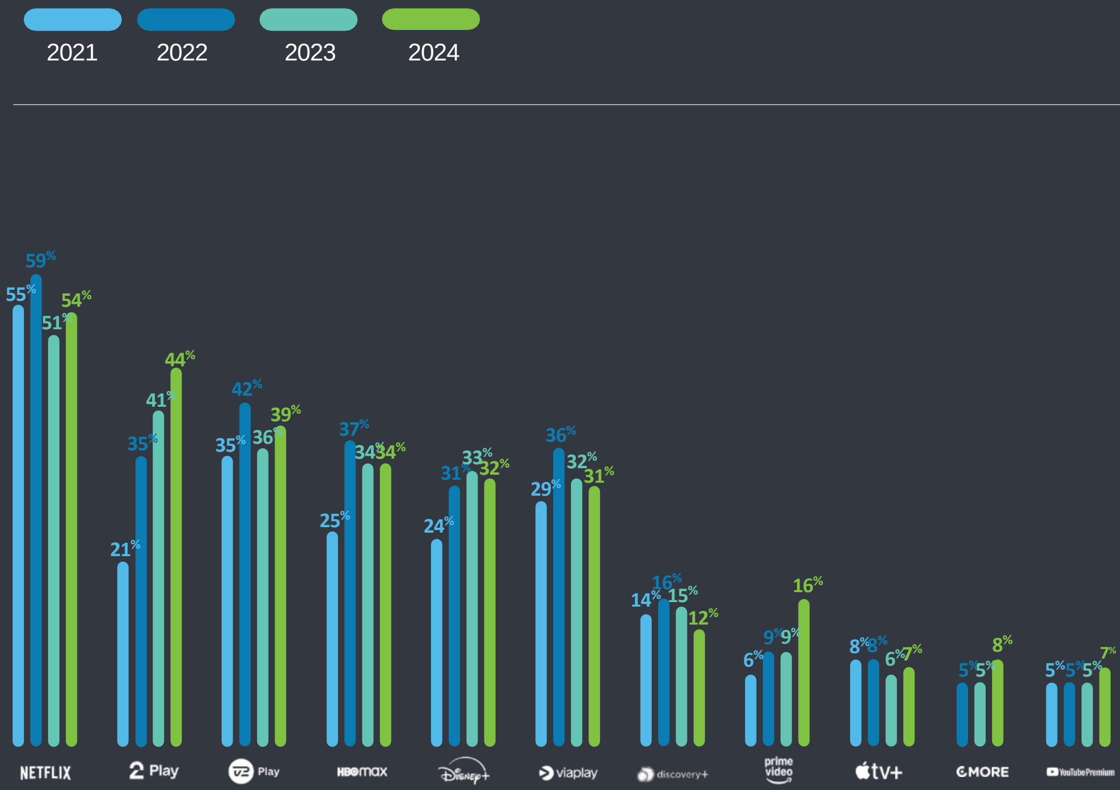


Streaming providers battle for market share

- The streaming service market has seen consistent growth, with new entrants like Disney+ making a significant impact since 2021. Netflix remains the leader despite some fluctuations, while Max and TV2 Play have shown steady growth.
- Prime Video has gained notable traction over time, reflecting a growing diversification in user preferences. In contrast, services like Discovery+ and Viaplay have experienced some decline or stabilization after initial growth spurts.

Access to SVOD services: Yearly development

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

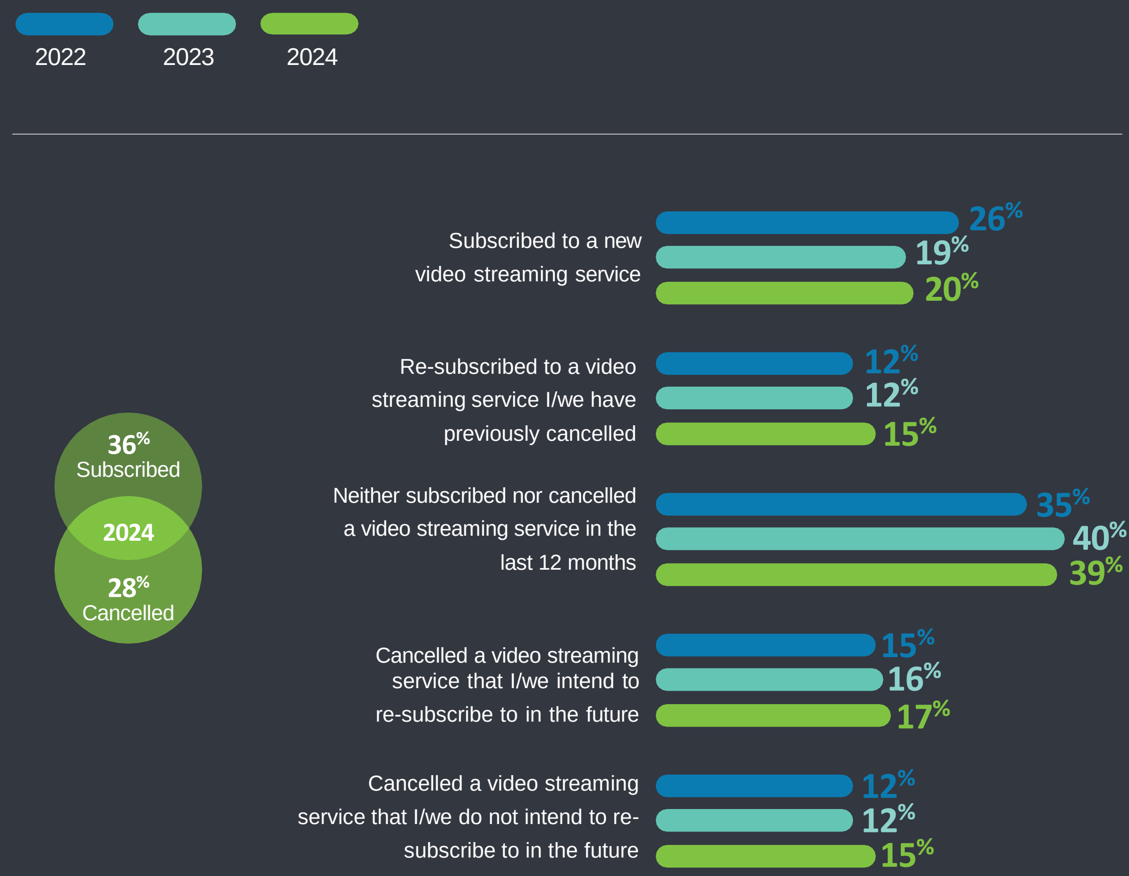


Cancellations and re-subscriptions both rise as viewers juggle options

- In 2024, both cancellations and re-subscriptions saw an uptick, suggesting that viewers are managing their streaming subscriptions more dynamically.
- Re-subscriptions rose to 15%, indicating that users are willing to return to platforms when fresh, appealing content becomes available.
- This trend reflects how households are increasingly treating streaming services as flexible, rotating options rather than fixed monthly commitments.

Access to SVOD services: 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 cancelled an existing ones? (Multiple choice question)

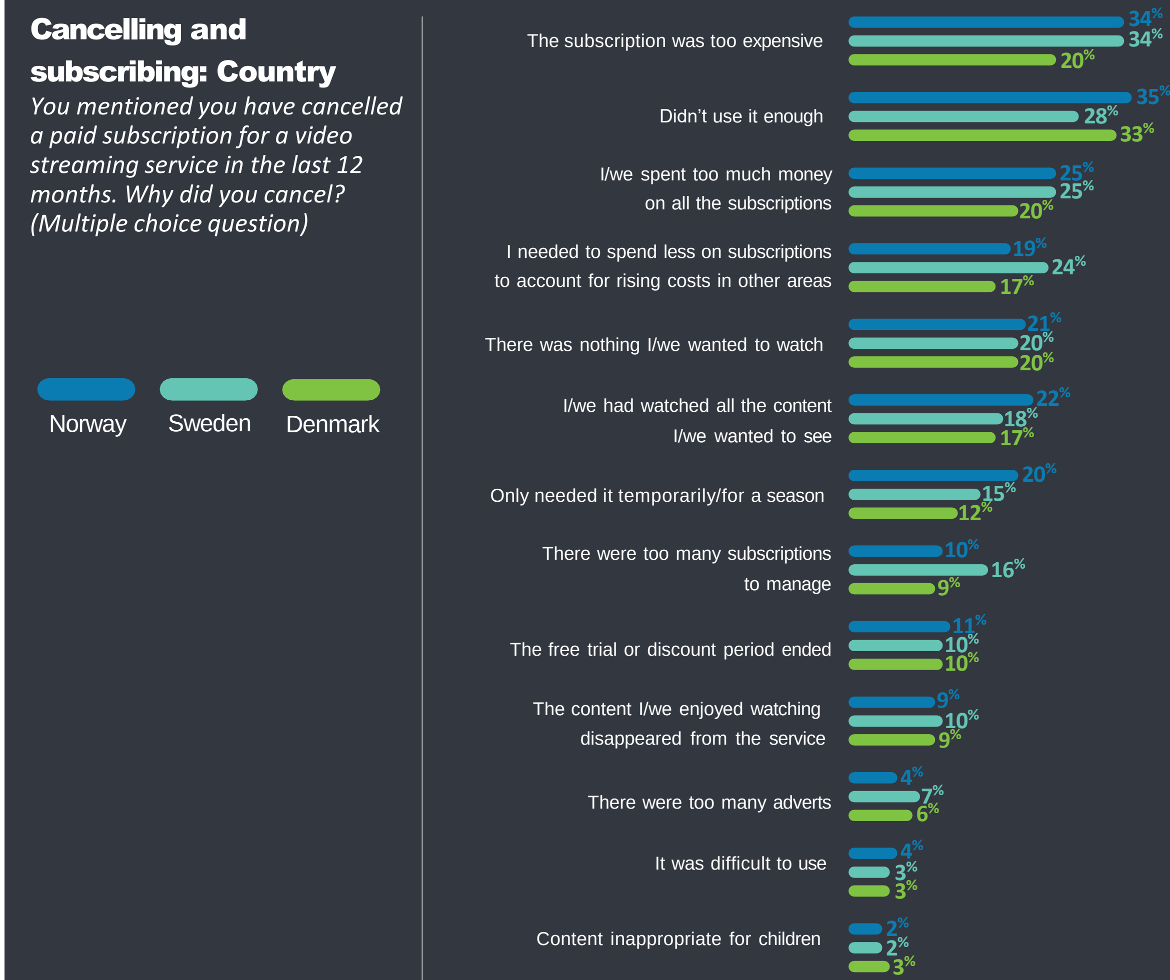


Rising costs and budget limits drive cancellations

- Viewers are cancelling subscriptions to cut costs and manage the overwhelming number of options.
- Rising inflation has tightened budgets, especially in markets like Sweden, where juggling multiple subscriptions is common.
- Households are prioritizing content and cost, rotating services, and benefiting from popular titles being available across platforms, making switching easier.

Cancelling and subscribing: Country

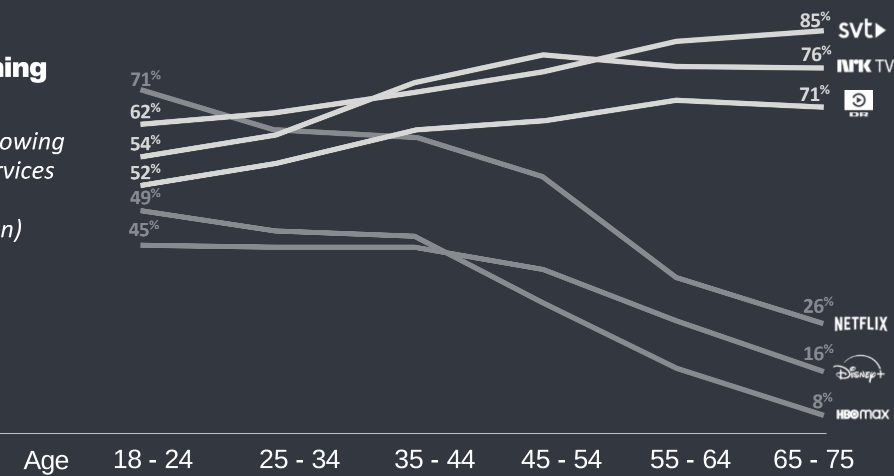
You mentioned you have cancelled a paid subscription for a video streaming service in the last 12 months. Why did you cancel? (Multiple choice question)



Viewers across all age groups embrace national broadcasters

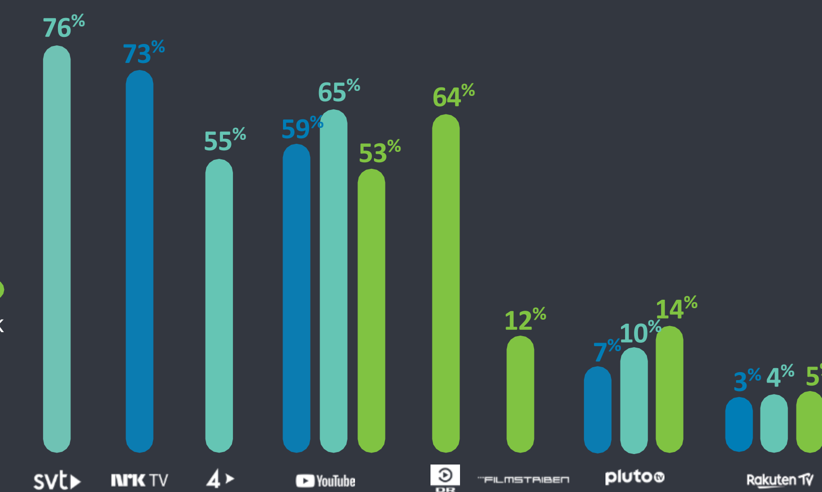
- National broadcasting services continue to succeed with streaming preferences across all age groups, with platforms like SVT Play, NRK TV and DRTV leading in accessibility and engagement.
- Notably, SVT Play is the most widely used, reaching 85% of users in the 65-75 age group and maintaining high engagement even among younger audiences (62% in the 18-24 demographic).
- In contrast, international commercial streaming services like Netflix, Max (HBO), and Disney+ show a steady decline in usage with age.
- Netflix leads among the younger demographic at 71% for the 18-24 group, but this drops sharply to just 26% for the 65-75 group. Disney+ and Max (HBO) struggle with consistent engagement, with Max (HBO) hitting as low as 8% in older age groups.

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



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

Norway Sweden Denmark



Ad-supported video on demand is gaining momentum

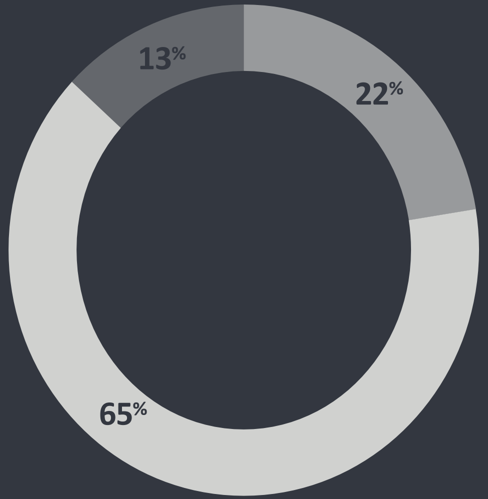
- Ad-supported video on demand (AVOD) is growing, with over 20% of viewers in the Scandinavian countries now using services that include ads.
- Regionally, Denmark is showing the highest interest—over a quarter of respondent report using ad-supported streaming.

AVOD Subscription

22% - Yes, I/we have subscribed to a paid streaming service that shows adverts

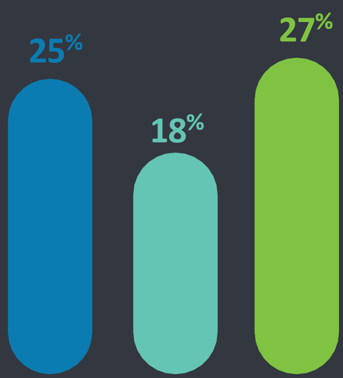
65% - No, I/we have not subscribed to a paid streaming service that shows adverts

13% - Don't know



AVOD Subscription: Country

In the last 12 months, have you or someone else in your household subscribed to any streaming service that shows adverts during or between programs?

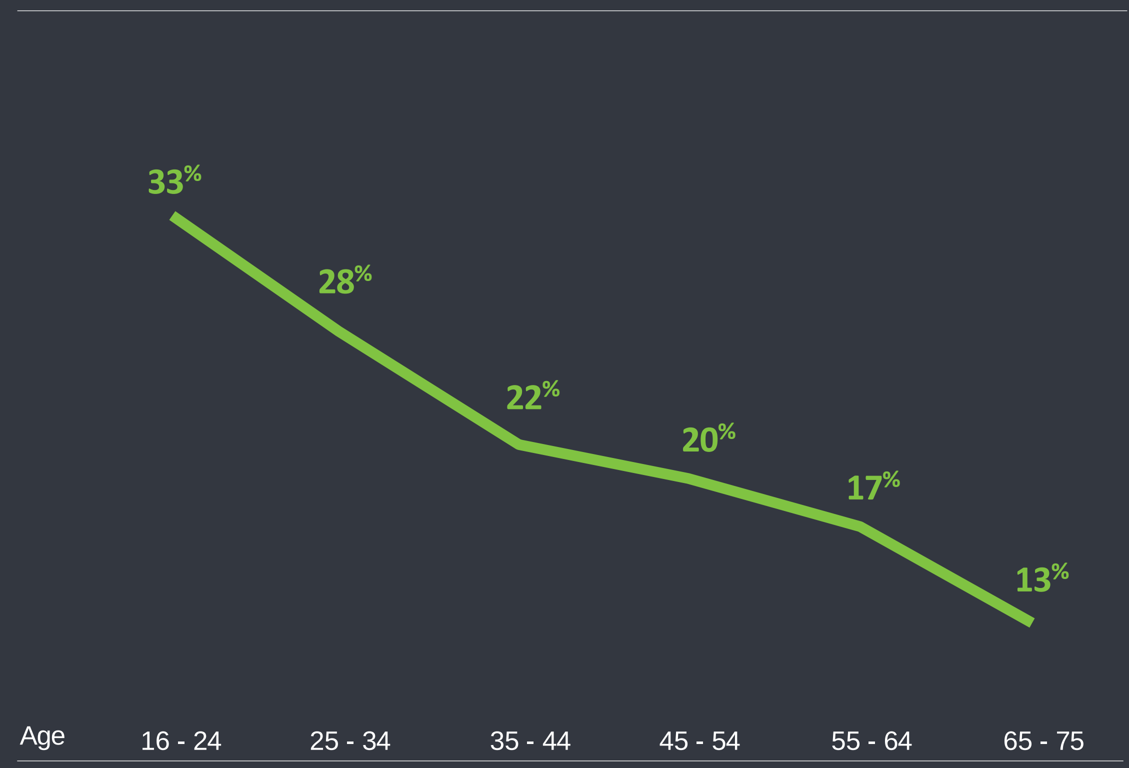


Drived by younger subscribers

- Younger audiences are especially open to AVOD, embracing ad-supported streaming perhaps as a cost-effective alternative to traditional subscription services.

AVOD Subscription: Age

In the last 12 months, have you or someone else in your household subscribed to any streaming service that shows adverts during or between programs? (Figure shows respondents who have subscribed to AVOD)



Selective sports streaming: Major events keep viewers subscribing

- The report reveals that interest in football streaming subscriptions varies greatly by league. Major events like the Euro and World Cup attract the most consistent interest, while other leagues see significantly lower demand.
- This trend suggests that viewers are becoming more selective, subscribing only to platforms offering high-profile tournaments rather than committing to multiple services.

Sports and Streaming

For each one, please say whether, or not, you would subscribe to a streaming service provider if it was the only way you could watch them?

From novelty to everyday: Generative AI finds a place in Scandinavian life

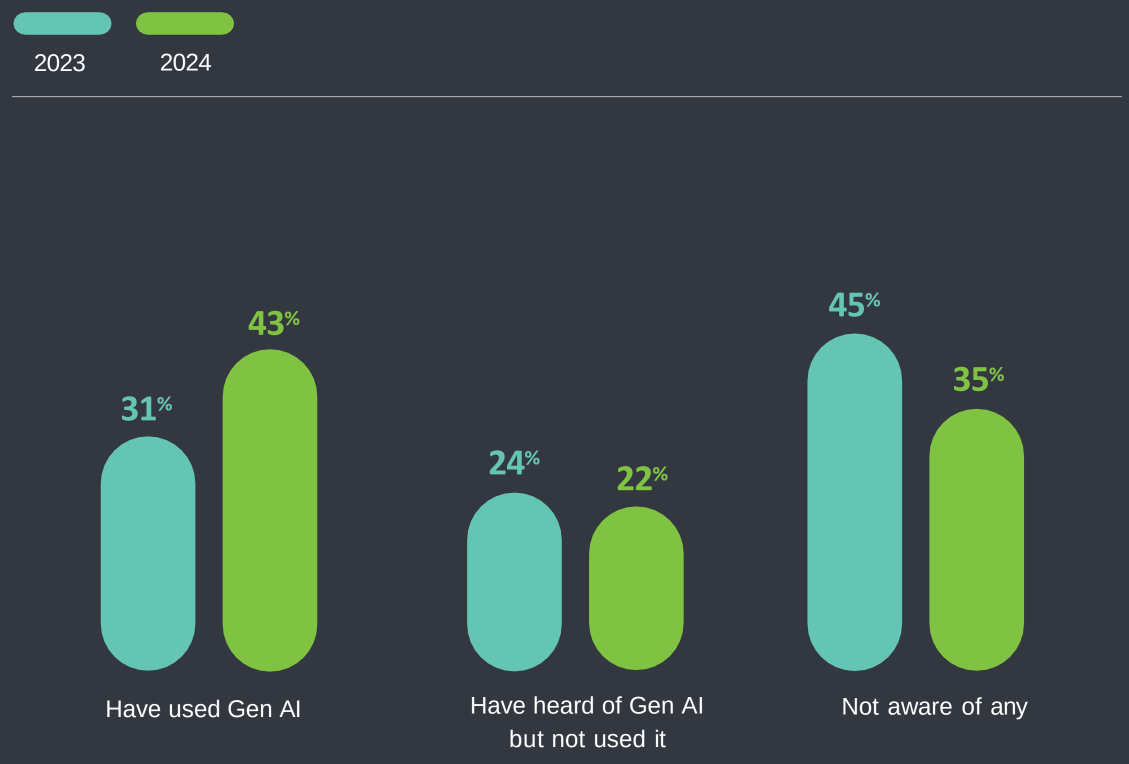
- In 2024, the survey reveals a shift in Generative AI (Gen AI) from a novelty to a tool moving closer to everyday use.
- Awareness is growing, with over one-third of people having tried AI tools, and those unfamiliar with AI are becoming fewer.
- The data also shows more frequent use, particularly among older users.

Gen AI moves from experimentation to broader adoption in Scandinavia

- Between 2023 and 2024, the number of people unaware of AI tools fell from 45% to 35%.
- Those who have tried it rose from 31% to 43%.
- This shift indicates that AI is moving beyond just tech enthusiasts and early adopters and catching the interest of a broader audience.
- While not yet fully a part of everyday life, Gen AI is steadily working its way into Scandinavian awareness.

Familiarity with Gen AI: Yearly development

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)

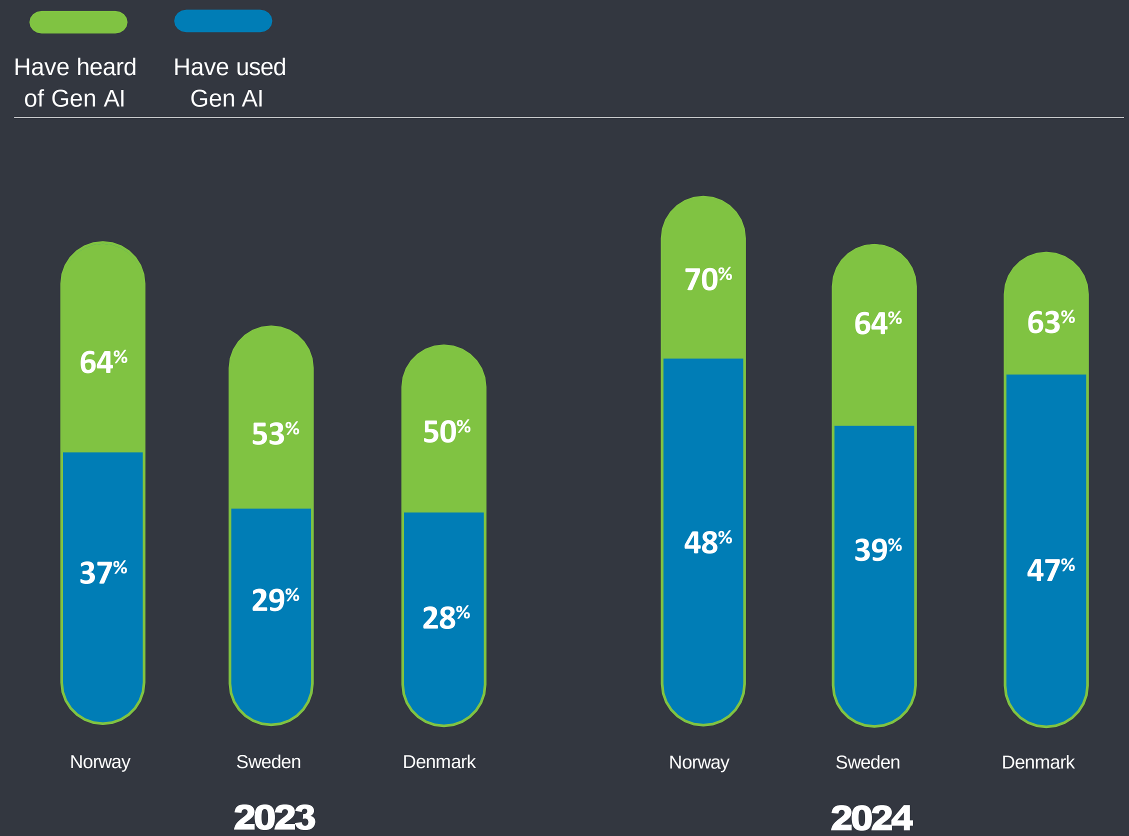


Differences in awareness and usage among Scandinavian consumers

- Across countries, both awareness and usage have grown, with Denmark seeing the largest rise while Norway stays in front. Sweden is trailing slightly—possibly due a more cautious stance and ongoing debates around data privacy.

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)



Awareness and usage of Gen AI vary by age

- Awareness and usage of AI tools are rising across age groups, with certain demographics leading the way. The 45-54 age group saw the biggest jump, with usage climbing from 22% in 2023 to 37% in 2024, showing that AI is resonating, even with older users.

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)

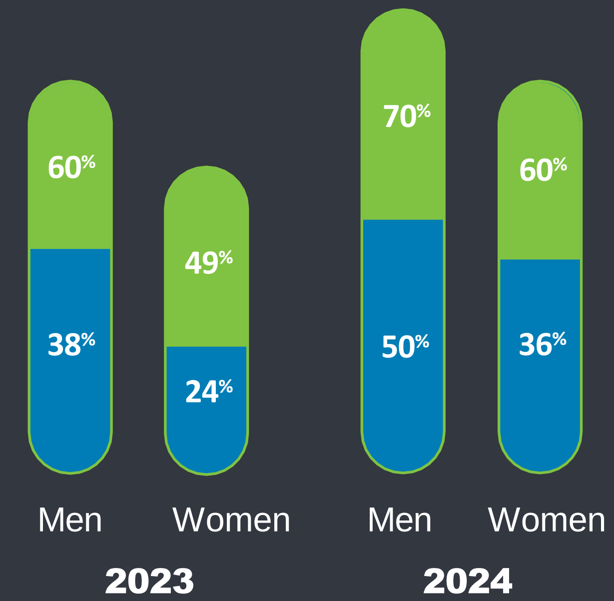
Gender shapes awareness, usage, and perception of accuracy in Gen AI

- Men continue to lead in both awareness and usage of Gen AI, with 50% of Scandinavian men having used Gen AI tools, compared to 36% of Scandinavian women in 2024.

- One reason for this gender gap may be that women have a trust gap , which is also discussed in this years' Deloitte TMT Predictions. This survey reinforces the idea, revealing that women perceive AI responses as less factual than men do.

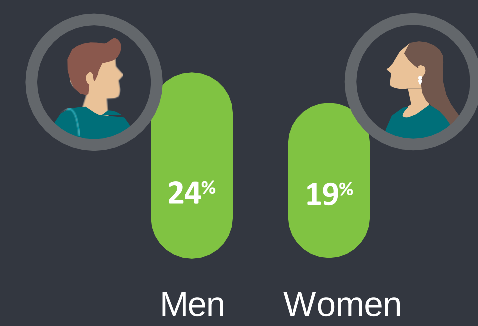
Awareness and use of Gen AI: Gender

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)



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"? (Figure shows respondents who have used any Generative AI tool and the share of respondents who chose "agree")



Gen AI use approaches routine – but it isn't a daily habit

- Frequent engagement with AI tools is rising steadily.
- More users are now interacting with AI as over 20% state that they use an AI tool on a weekly basis.
- Correspondingly, those who only tried it once or twice have dropped from 40% in 2023 to 27% in 2024. This shift points to more sustained interest and regular use.

Frequency of Gen AI use: Yearly development

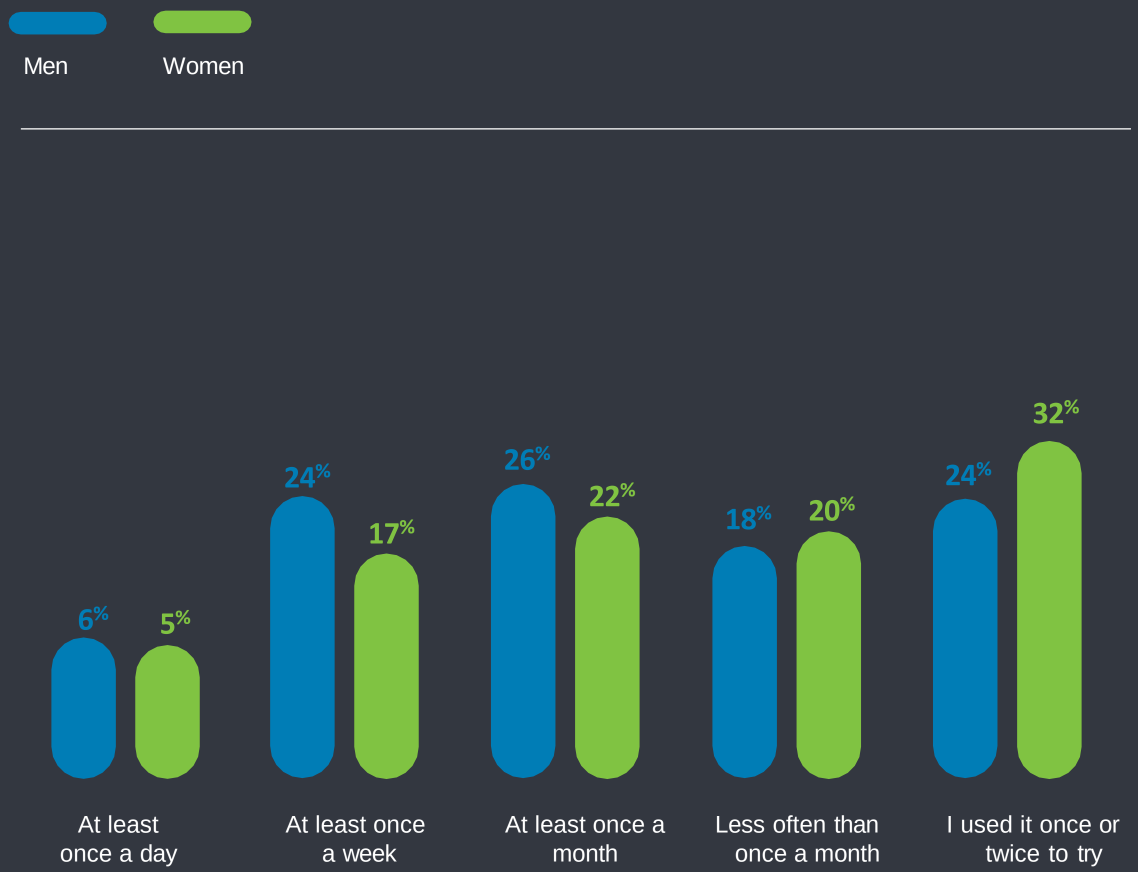
You mentioned you have used Generative AI (e.g., ChatGPT, DALL-E, etc.). Which of the following best describes your usage?

Usage differs by gender

- Weekly usage differs by gender: 24% of men use AI weekly, while 17% of women do.
- Daily use remains limited, with 6% of men and 5% of women engaging daily.
- These numbers suggest that AI, while not yet a daily habit, is gradually finding its place in people's routines. With ongoing, consistent growth, AI might soon become a more frequent tool in everyday life.

Frequency of Gen AI use: Gender

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

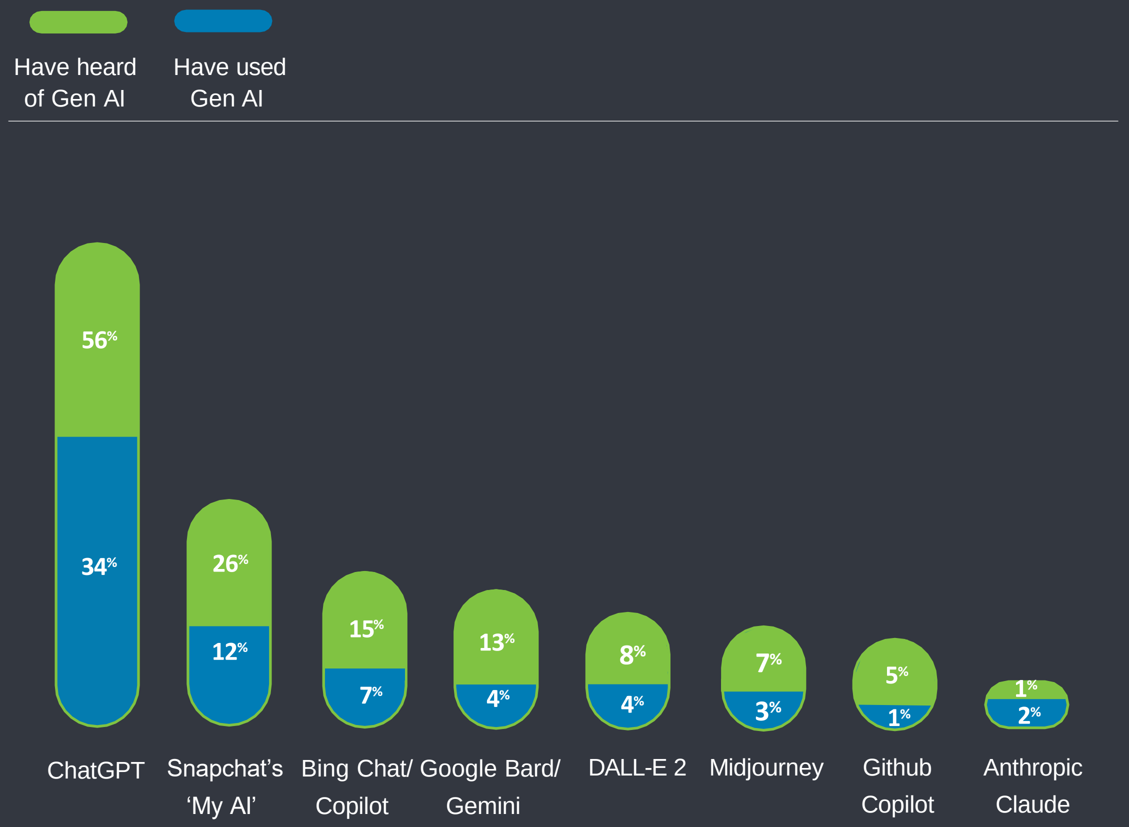


ChatGPT leads, but new contenders gain ground

- ChatGPT remains the most widely used Gen AI tool, with 56% awareness and significant engagement across demographics. However, newer tools like Google Bard/Gemini and Bing Chat/Copilot are gaining traction, with rising awareness and usage since 2023.
- Bing Chat/Copilot's integration into Office apps like Word, Excel, and Outlook has likely boosted its popularity by embedding AI into daily workflows. This seamless integration may also mean actual usage exceeds reported awareness, as many users might be unknowingly leveraging Gen AI tools.

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)

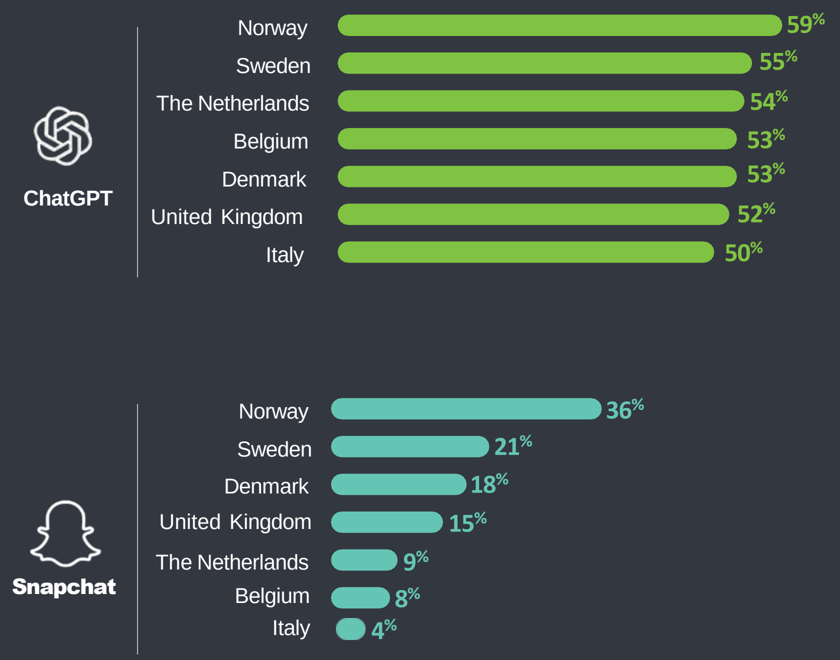


Awareness of ChatGPT and Snapchat's 'My AI'

- When looking at the numbers for each country, awareness of Gen AI tools varies.
- ChatGPT takes the lead, where Norway tops the list with 59% of consumers aware of ChatGPT, followed by Sweden (55%) and the Netherlands (54%). Even in Italy, where awareness is lower, half of the consumers are familiar with ChatGPT.
- In contrast, Snapchat's "My AI" has a more limited reach. However, Norway again leads with 36% of consumer aware of the tool, but levels drop sharply in other countries, such as Italy (4%) and Belgium (8%).

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)

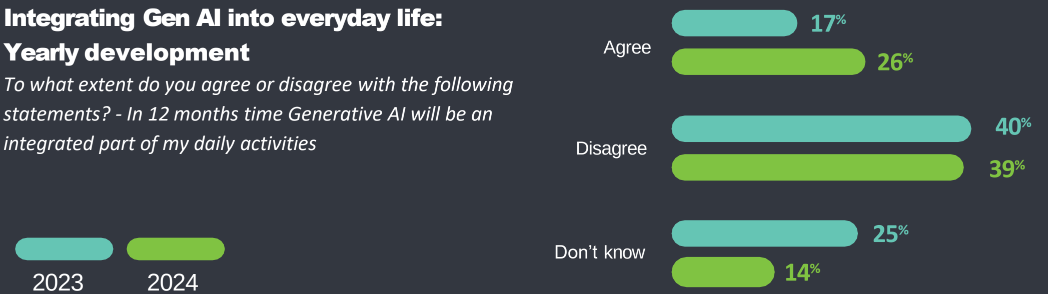


More see Gen AI becoming a part of daily life

- The share of people who believe Gen AI will become part of their daily routines has risen from 17% to 26%.
- This increase indicates a shift in perspective, with more people viewing Gen AI as a potentially valuable, regular tool.
- Younger age groups are especially receptive to Gen AI's integration into daily life, while older groups remain more skeptical or unsure.
- These differences might be because younger users are generally more comfortable with tech, and some groups may already see specific productivity benefits from Gen AI. On the other hand, others might not yet see clear, practical applications in their own routines, making it harder for them to imagine Gen AI's everyday use. Privacy concerns could also contribute to a more cautious outlook.

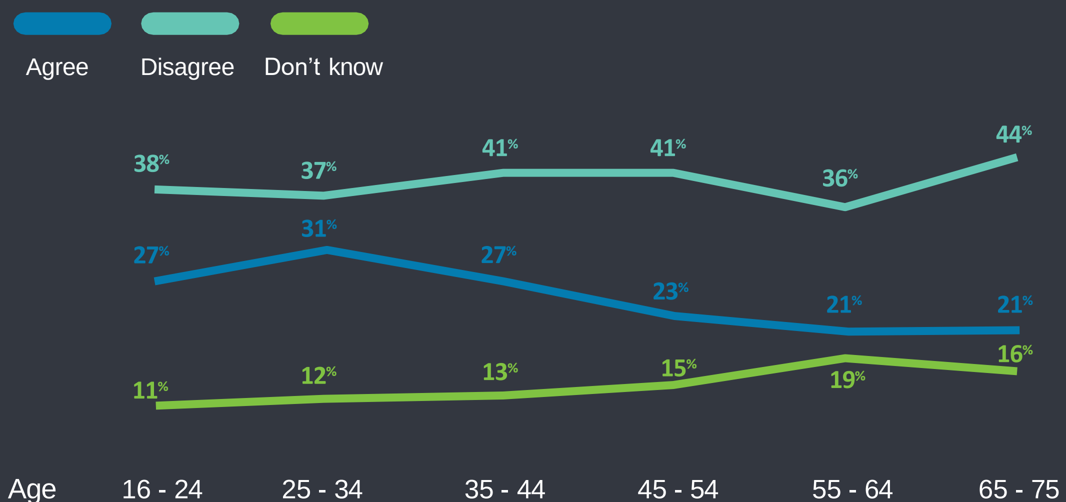
Integrating Gen AI into everyday life: Yearly development

To what extent do you agree or disagree with the following statements? - In 12 months time Generative AI will be an integrated part of my daily activities



Integrating Gen AI into everyday life: Age

To what extent do you agree or disagree with the following statements? - In 12 months time Generative AI will be an integrated part of my daily activities

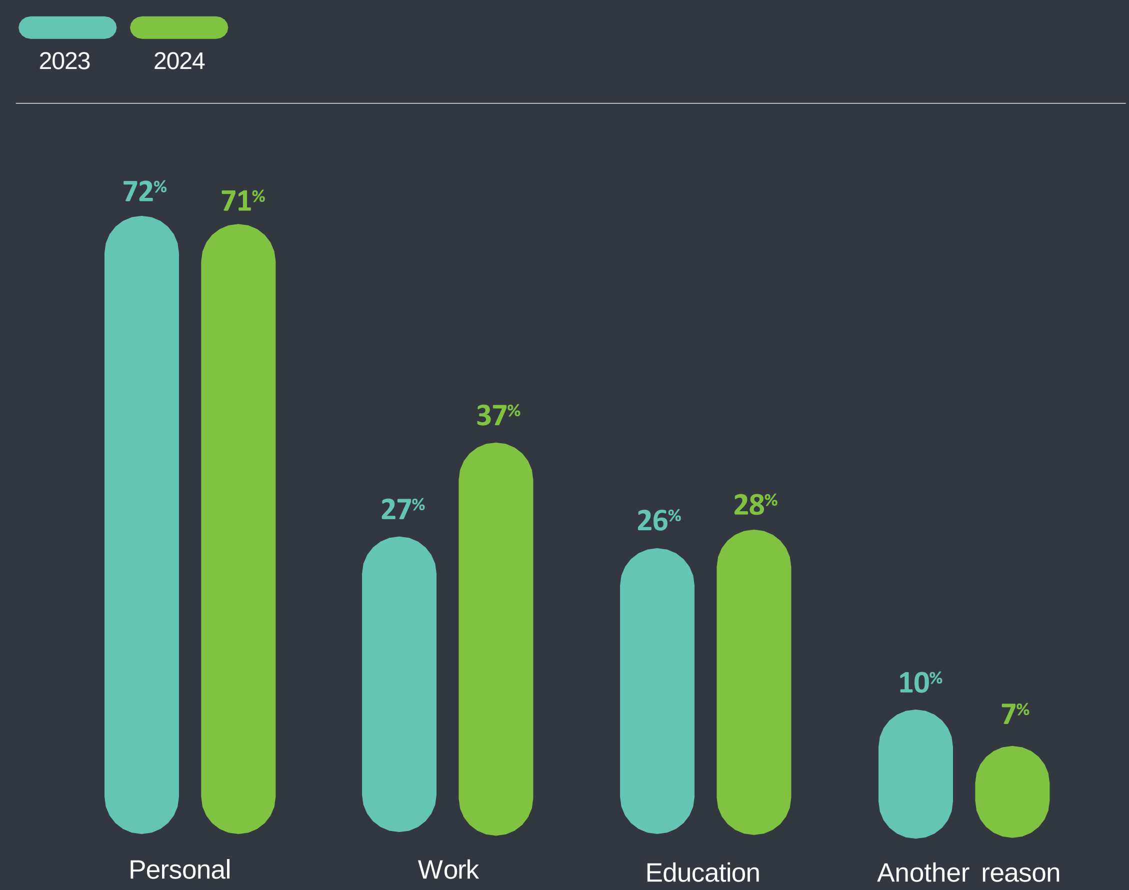


Gen AI makes its mark in the Scandinavian workplace

- Looking at how Gen AI is used, work-related applications experienced the largest growth, climbing from 27% in 2023 to 37% in 2024. Meanwhile, personal use remains the most common purpose, with 71% of users, showing minimal change from last year.

Gen AI purpose for use: Yearly development

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



Shopping in Scandinavia: Trust and digital wallets lead the way

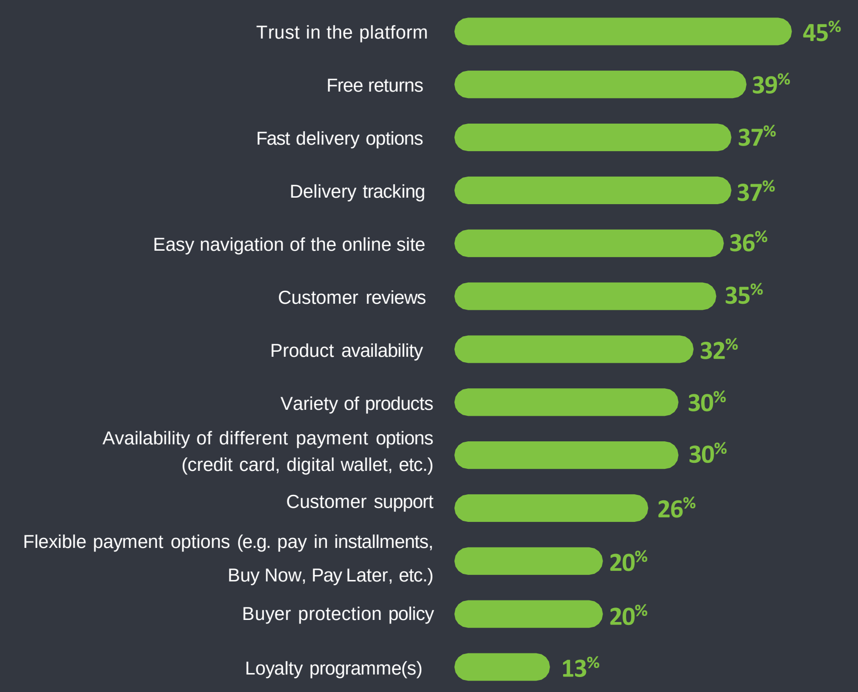
- In 2024, digital payments have become a routine for many Scandinavian consumers. Consumers in this survey reveal their top online shopping priorities, from trusted platforms to seamless returns and quick delivery.
- Sweden values trust above all, while Norway leans toward product variety, and Danish shoppers prioritize convenient returns.
- Younger consumers are driving the shift to mobile payments, with Norway seeing a distinct rise in smart device transactions.
- These findings illustrate the varied payment preferences and priorities driving online shopping in the region.

Trust, free returns, and fast delivery shape online shopping habits

- When choosing where to shop online, trust in the seller is the top priority for consumers, as 45% consider it crucial.
- Following closely are convenience policies like free returns (39%) and fast delivery (37%).

Key considerations when online shopping

Which, if any, of the following are important to you when choosing to shop online? (Multiple choice question)

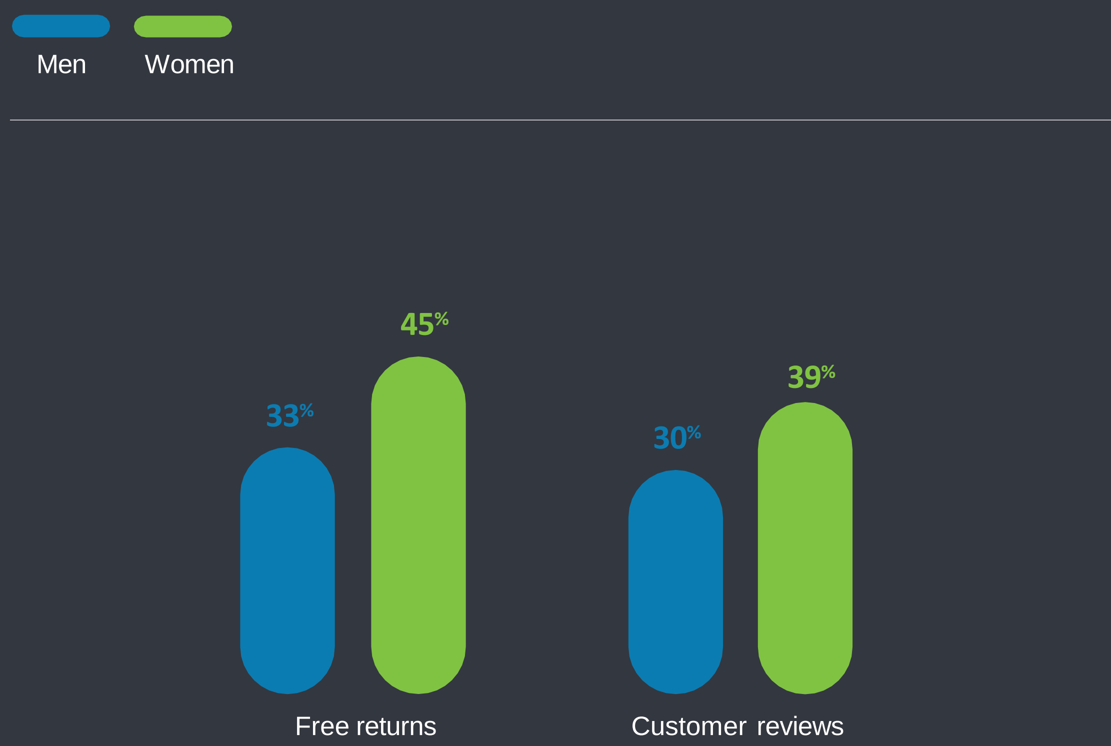


Women favor free returns and customer reviews

- While there aren't any major gender-based differences in online shopping preferences, some variations do stand out.
- Women value free returns (45%) significantly more than men (33%) and are also more likely to prioritize customer reviews – 39% of women consider them important versus 30% of men.

Key considerations when online shopping: Gender

Which, if any, of the following are important to you when choosing to shop online? (Multiple choice question)

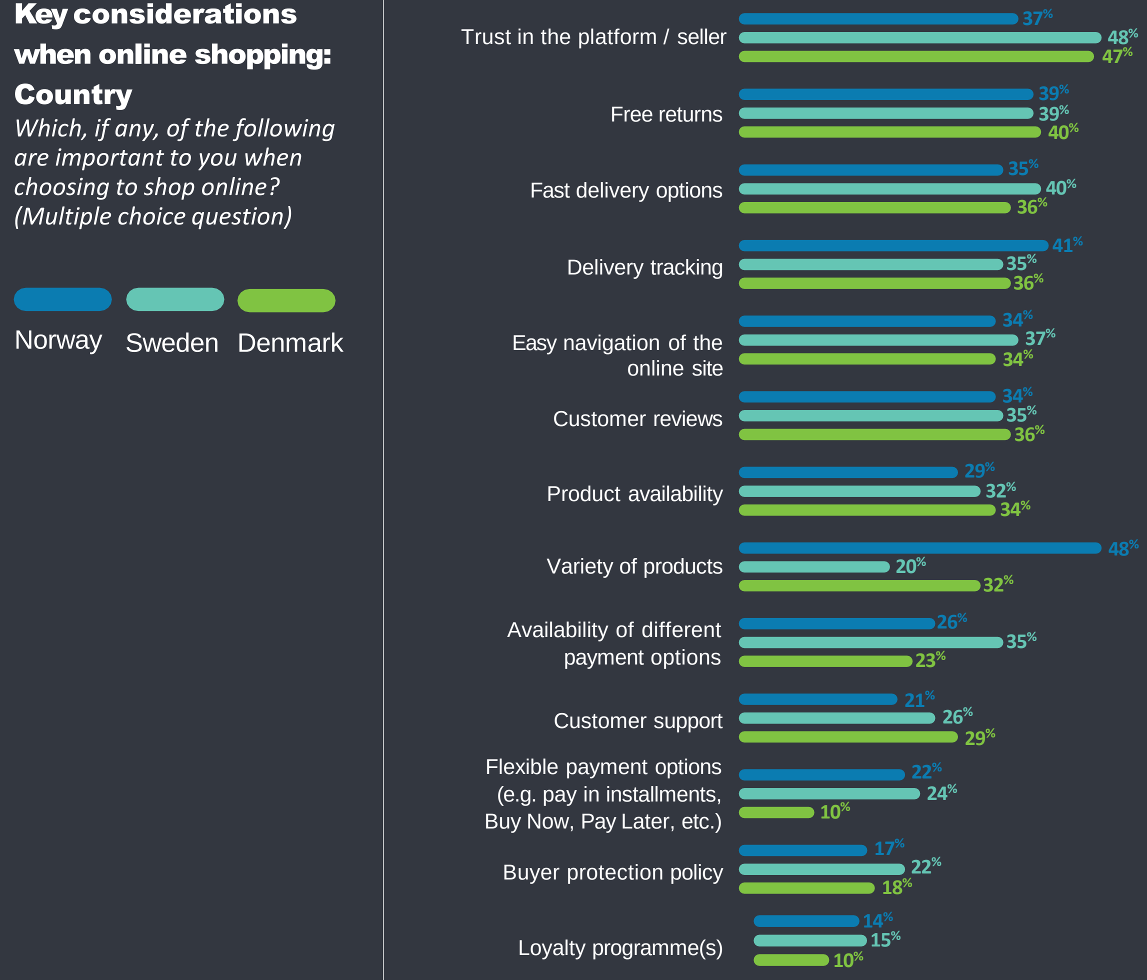


Scandinavian shopping preferences diverge

- Online shoppers in Scandinavia have slightly different priorities. Trust in the platform scores highest in Sweden (48%) and Denmark (47%) but lower in Norway at 37%. Free returns and fast delivery options are equally valued across all three countries.
- Norwegian shoppers stand out for their preference for product variety, with 48% considering it a key factor—significantly higher than in Sweden (20%) and Denmark (32%).
- A variety in payment options – when and how to pay – are also more important to Swedish shoppers (35%), who particularly value options like "Buy Now, Pay Later." In Sweden, most online vendors have during the last couple of years begun to offer flexible credits, which might be one of the explanations for this preference.

Key considerations when online shopping: Country

Which, if any, of the following are important to you when choosing to shop online? (Multiple choice question)

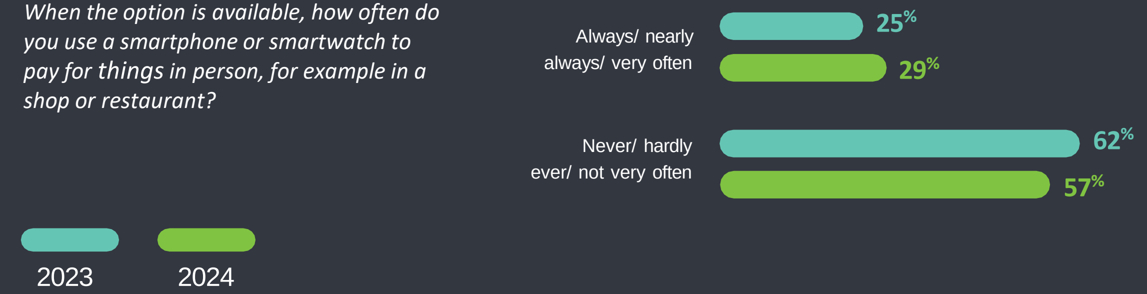


In-person smart device payments on the rise

- For in-person payments, such as at shops or restaurants, the shift from physical cards to digital wallets is advancing.
- Frequent use of smart devices, such as mobile phones or smart watches, for in-person payments rose from 25% in 2023 to 29% in 2024, while infrequent use declined from 62% to 57%.
- Younger consumers (18-34) are the most frequent users of smart devices for payment, though usage is gradually growing among those over 55 as well.

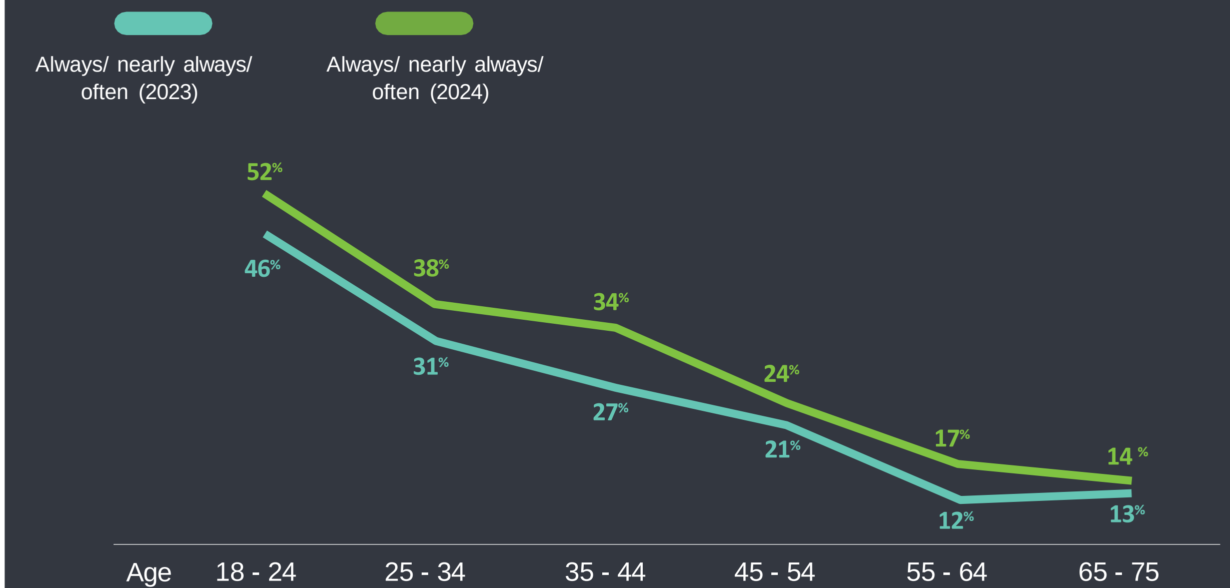
Payments with smart devices: Yearly development

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



Payments with smart devices: Age

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

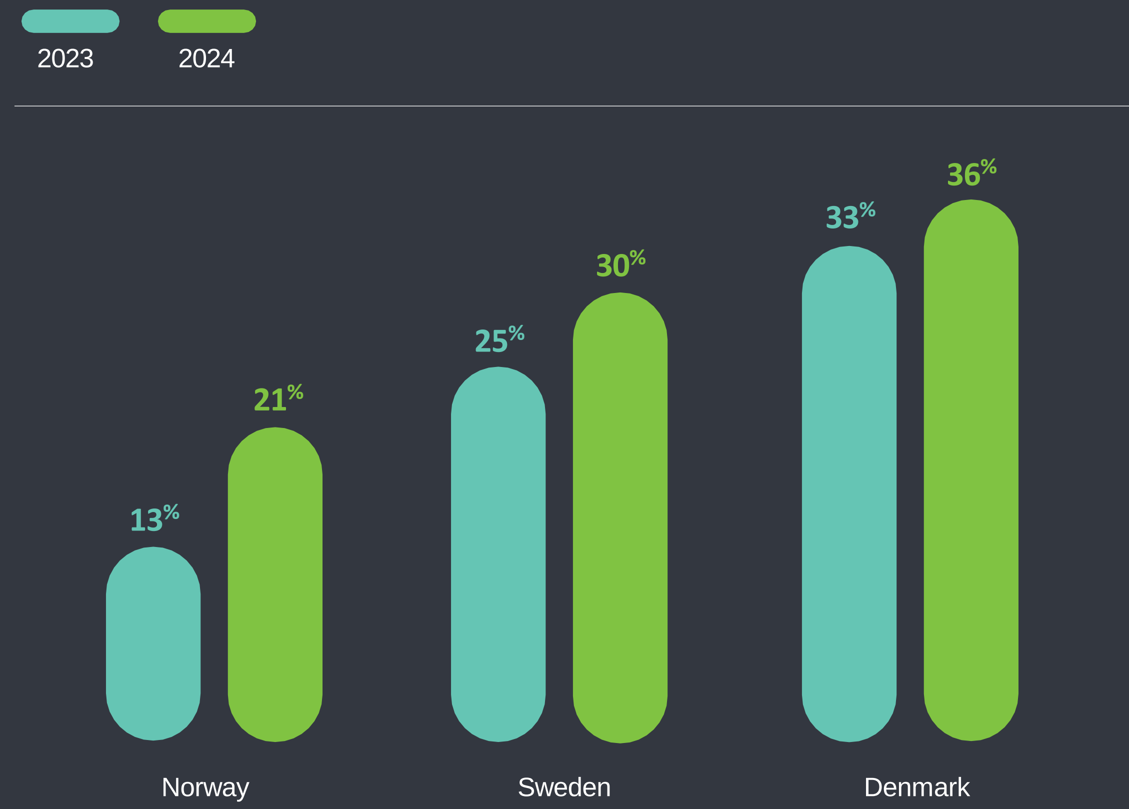


Momentum builds for smart payments in Norway

- Norway experienced the most significant rise, with frequent smart device payments jumping from 13% in 2023 to 21% in 2024.
- Norway's growth in digital payments may be a consequence of local laws that encourage competition, but that also limit the adaptation of global payment solutions. As a result, local options like Vipps have become more popular, leading to a slight delay in digital payment adaptation compared to the other Scandinavian countries.

Payments with smart devices: Country

When the option is available, how often do you use a smartphone or smartwatch to pay for things in person, for example in a shop or restaurant? (Figure showing respondents who chose always/ nearly always/very often)



Scandinavians uninformed about their carbon footprint, but still believe that action matters

- Scandinavian consumers have, in this survey, responded to questions about their awareness of carbon footprints, attitudes toward sustainability, and openness to purchasing refurbished tech.
- The answers reveal that awareness is low, with almost two thirds admitting they have no idea about their own carbon footprint. The majority also do not consider their environmental impact when making purchases.

Low consumer awareness of carbon footprints in Scandinavia

- The discussion about carbon footprints and sustainability has been prominent in the media, politics and board rooms for quite some time. Yet awareness among Scandinavian consumers remains low.
- Few Scandinavians have a clear understanding of their personal contributions, with 64% admitting they have "no idea" about their own carbon footprint.
- Notably, 78% either disagreed, neither agreed nor disagreed, or answered “don’t know” in response to the statement: “There is no point in reducing my own carbon emissions because it won’t make a difference anyway.” While respondents’ awareness of their environmental footprint may be low, this does not necessarily reflect the efforts Scandinavians make to reduce it.

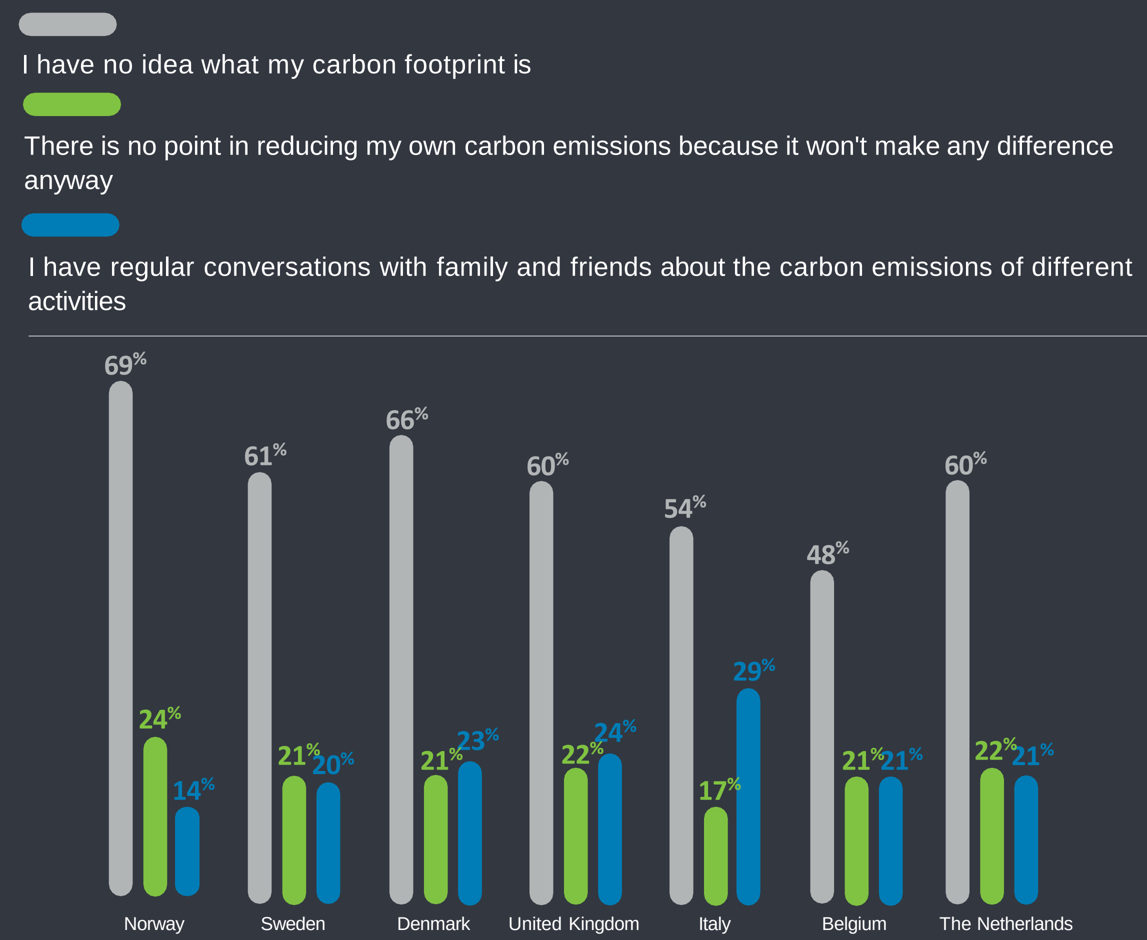
Sustainability awareness
To what extent do you agree or disagree with the following statements?

Low consumer awareness of carbon footprints throughout Europe

- Awareness of personal carbon footprints remains low across Scandinavia, with 69% of Norwegians admitting they are unaware of their own impact.
- These observations awareness of carbon footprint mirrors a broader European pattern. In the UK, 60% lack knowledge of their carbon footprint, while the figures are 60% in The Netherlands and 54% in Italy.
- Across Europe, social discussions on emissions remain limited, and 17-24% express skepticism about the effectiveness of personal actions.

Sustainability awareness: Country

To what extent do you agree or disagree with the following statements? (Figure shows respondents who chose "agree")

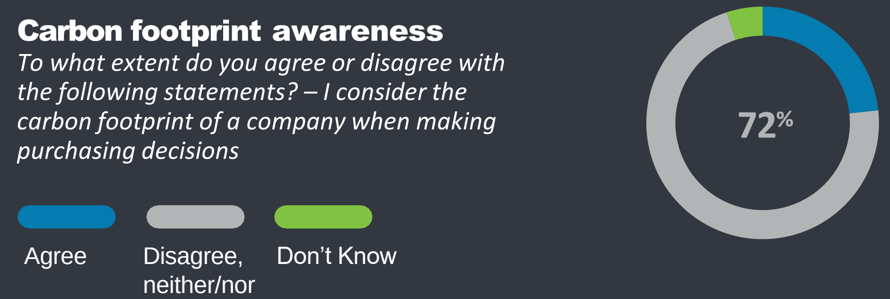


Environmental shopping: Carbon footprint more important to the young

- Overall, 72% of Scandinavian consumers respond with “disagree” or “neither agree nor disagree” to the statement that they do not consider a company’s carbon footprint when making purchasing decisions.
- When purchasing, younger Scandinavian consumers are more likely to consider the selling company's environmental impact. 32% of 16-24-year-olds agree that they take sustainability into account when making a purchasing decision. The number of people who agree with the statement diminishes as age goes up.

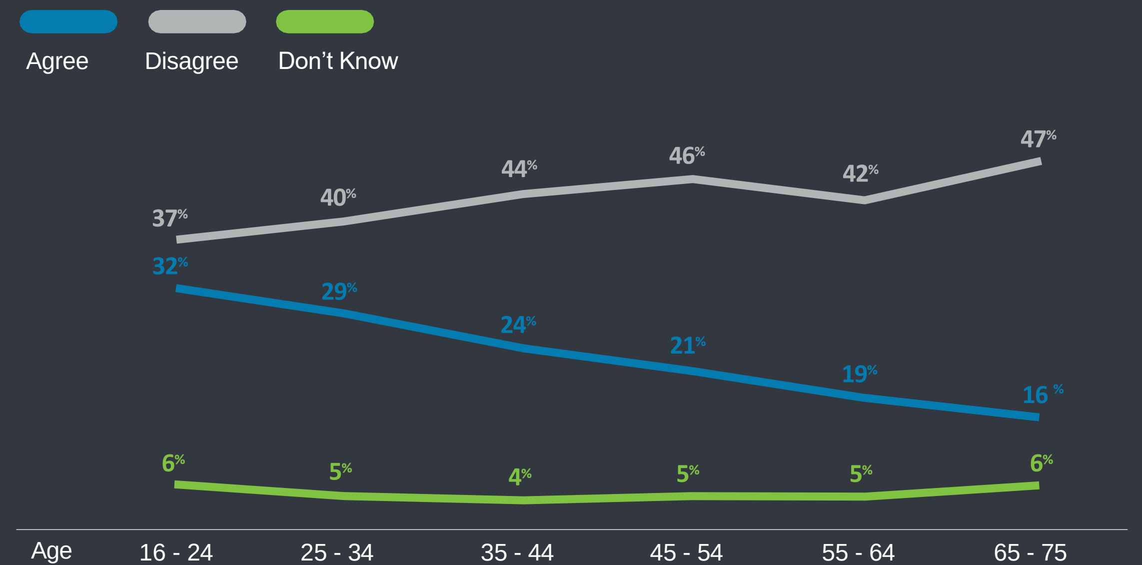
Carbon footprint awareness

To what extent do you agree or disagree with the following statements? – I consider the carbon footprint of a company when making purchasing decisions



Carbon footprint awareness: Age

To what extent do you agree or disagree with the following statements? – I consider the carbon footprint of a company when making purchasing decision



Scandinavians might buy used phones, but prefer new tech

- Phones are the most likely device to buy refurbished – 14% of respondents are willing to consider buying a refurbished phone.
- Laptops (10%) and smart TVs (9%) also have some appeal as second-hand options, though they are less popular than phones.
- Overall, refurbished devices remain the more unpopular choice, with most consumers (+80%) still preferring to buy new.

Consumer preferences when buying used/refurbished

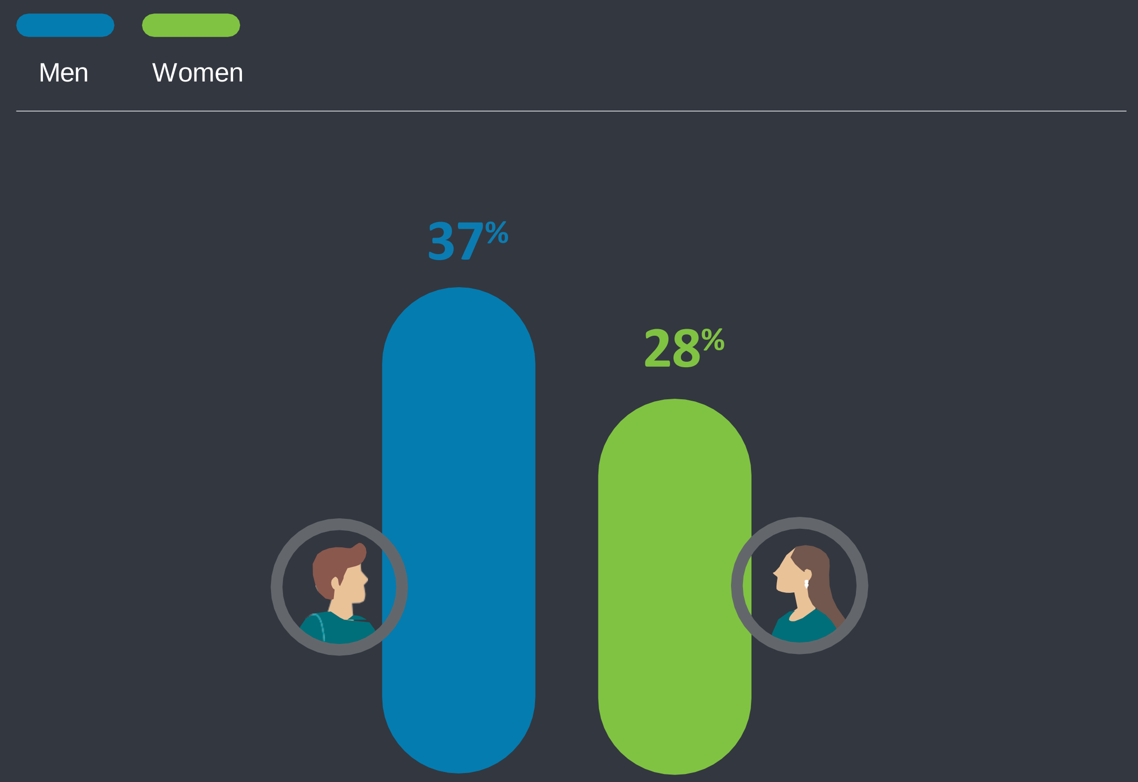
Which, if any, of the following devices do you intend to purchase used/refurbished in the next 12 months? (Multiple choice question)

Men more interested in buying refurbished

- Men show a higher willingness to buy refurbished devices compared to women. 37% of men express interest in refurbished smartphones, laptops, or TVs, while 28% of women share this interest.
- Smartphones remain the most popular refurbished item among men, followed by laptops and then smart TVs.
- Although these findings reveal a gender difference, the overall interest in refurbished devices is low across both groups.

Consumer preferences when buying used/refurbished: Gender

Which, if any, of the following devices do you intend to purchase used/refurbished in the next 12 months? (Multiple choice question. Figure shows respondents who chose smartphone, laptop and smart tv)



TV, TikTok, and truth: How Scandinavian news habits are shifting in 2024

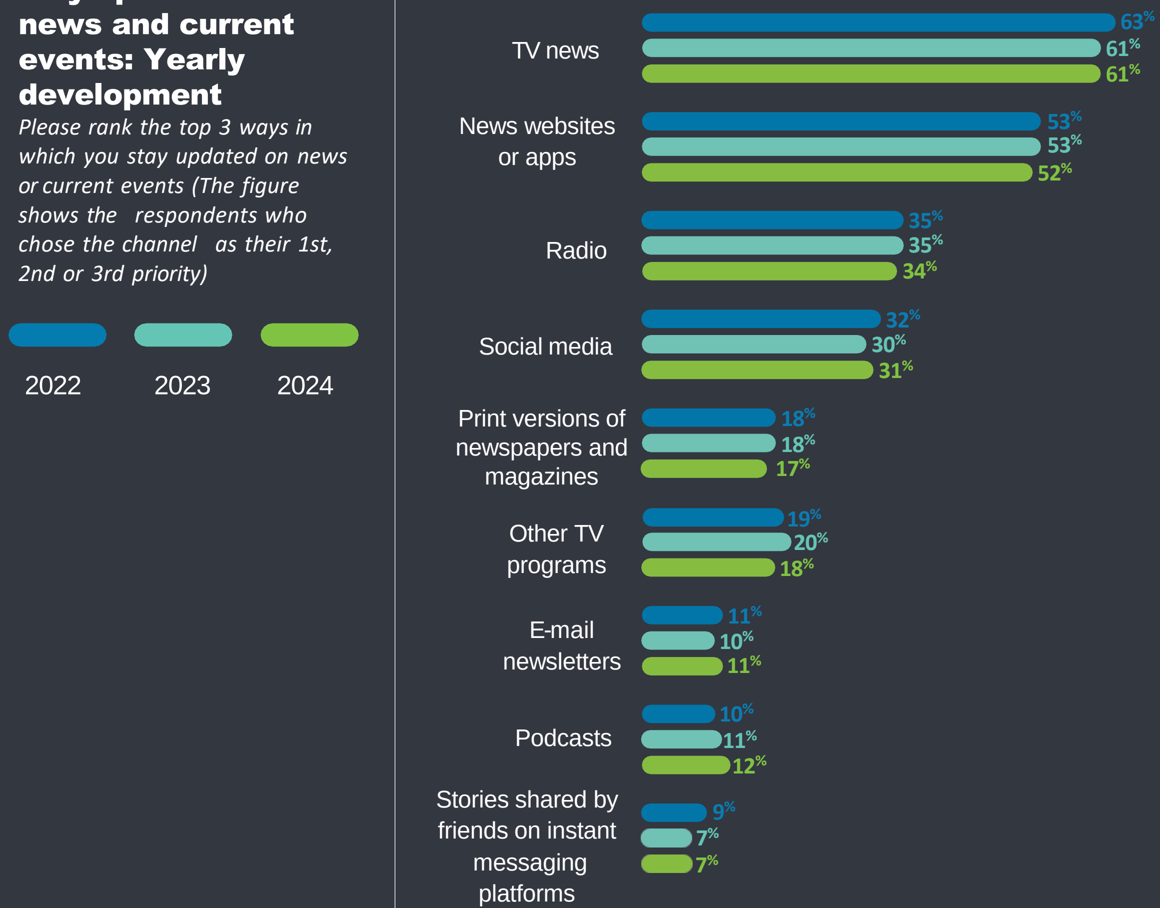
- TV remains the top news source, but younger audiences are shifting toward digital platforms, signaling a generational change.
- Respondents report moving from Facebook to video-centric platforms like YouTube and TikTok, challenging media companies to adapt to diverse audiences.
- The survey reveals concerns about misinformation and screen time, with many feeling exposed to false information and 61% saying they spend too much time on their phones.

Scandinavians choose TV for news, but digital is hot on the trail

- News habits have stayed steady from previous years.
- TV remains the most preferred news source in Scandinavia in 2024, with over 60% of respondents selecting it as a top choice.
- Digital news outlets, like websites and apps, were selected by 52% of respondents.
- Social media captures 31% as a primary news source, with radio at 34% — both showing minimal change over time.
- Print media continues to decline.
- Lower-ranked sources, including email newsletters, podcasts, and messaging platforms, each maintain a small but stable following at around 7-12%.

Preferred ways to stay updated on news and current events: Yearly development

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)

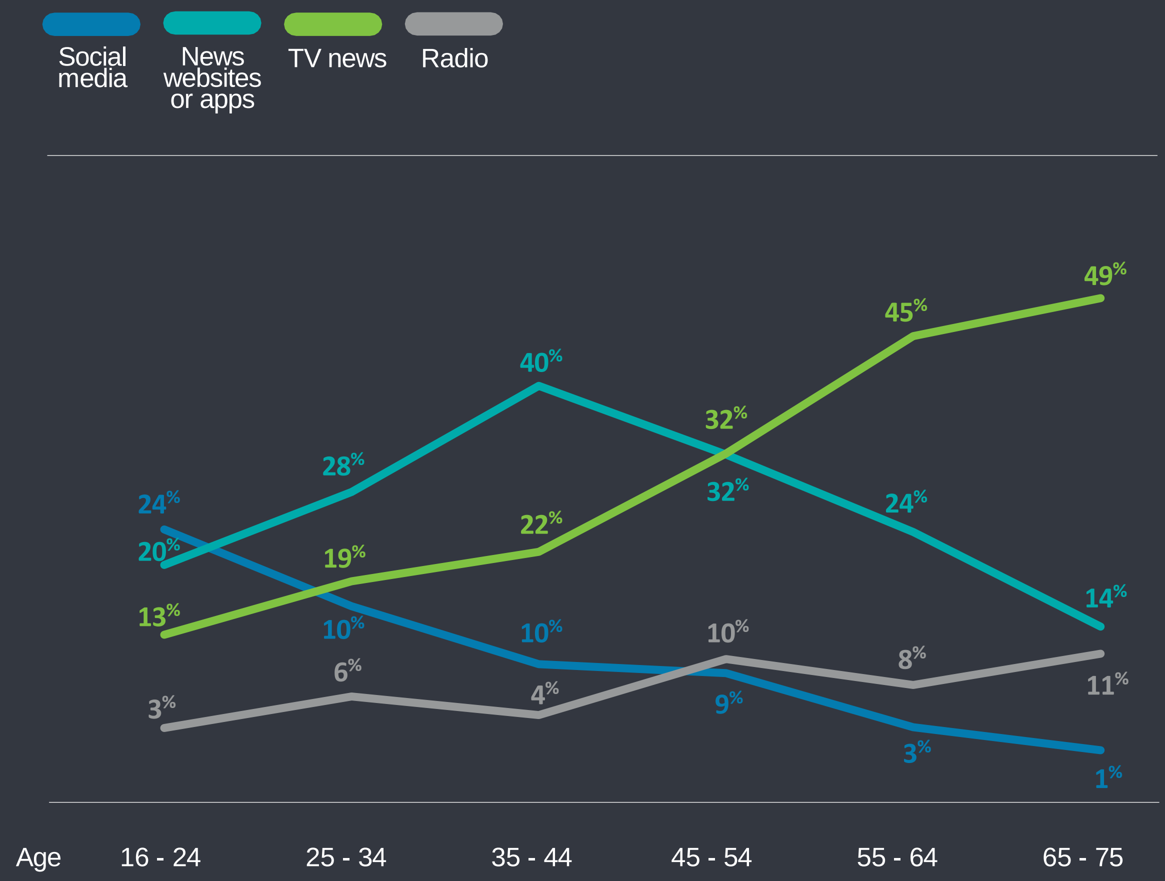


Young audiences prefer social media over TV news

- Scandinavian news consumption in 2024 highlights a generational divide.
- Social media is the main news source for 24% of 16-24-year-olds but only 1% of those aged 65-75.
- TV news peaks at 49% in the older age group.
- News websites are most popular with 35-44-year-olds (40%) but decline with age.
- This divide poses a pressing question for media companies: invest in the familiarity of traditional TV for older viewers or embrace the dynamic digital platforms favored by younger audiences?
- Success hinges on mastering both—strategically allocating resources, tailoring content for diverse platforms, and adapting to the foreseen decline of traditional TV.

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 (Multiple choice question. The figure shows respondents most preferred)

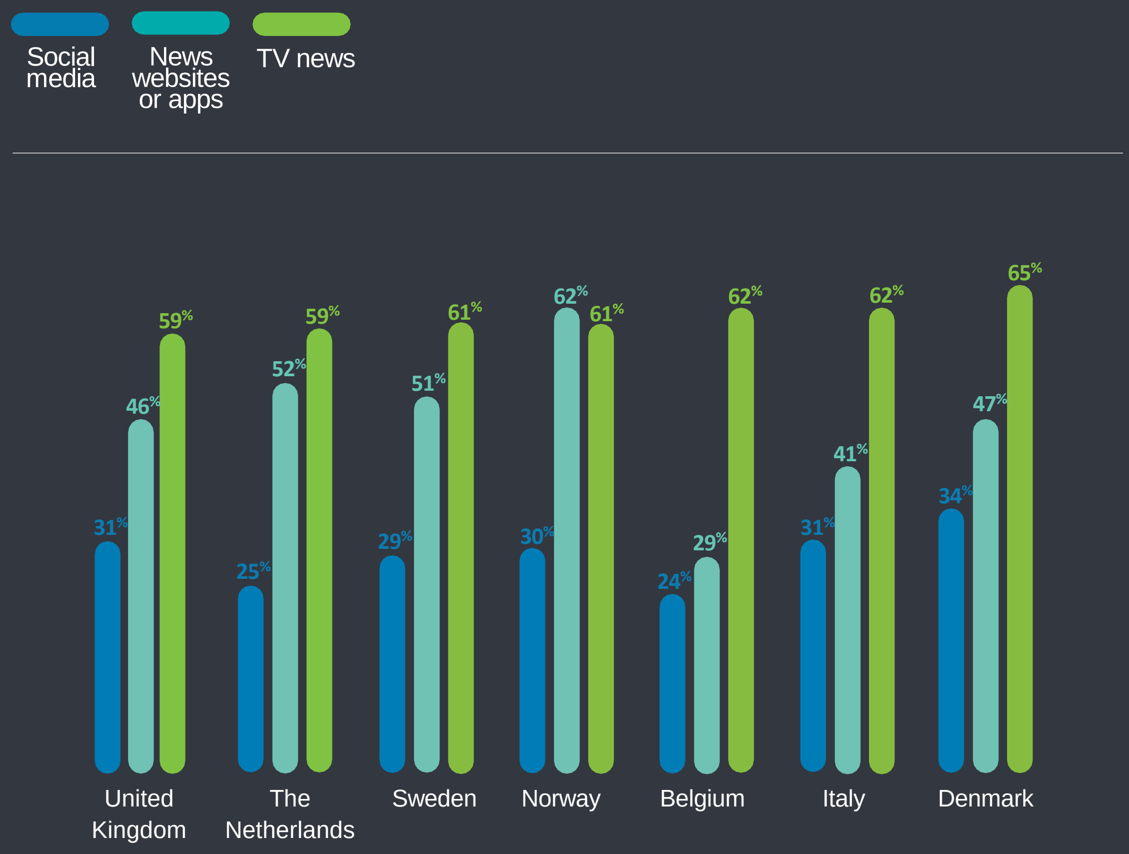


TV news dominates Europe, but digital is on the rise

- Across Europe, TV news is the top choice for staying informed for the population as a whole.
- The exception is Norway, where online news has overtaken TV as the preferred choice — 62% of Norwegians rank news websites and apps as their top news source.
- The Netherlands and Sweden also have substantial audiences for social media, suggesting a growing preference for digital news options across Europe, even in traditionally TV-dominated areas.

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

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



Social media as a news source: Facebook declines, video platforms grow

- In a comparison between the social media platforms, the longstanding giant, Facebook, is still leading as a news source – though it has seen a significant decline over the past few years.
- Since 2022, Facebook as a preferred news choice has dropped from 71% to 59%.
- At 48%, Instagram is maintaining a steady position in second place, while X (formerly Twitter) and Snapchat maintain their shares.
- Meanwhile, the video-centric platforms are gaining traction as news sources. In 2024, YouTube grows to 28% and TikTok to 21%, continuing their upward trajectory from recent years.

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

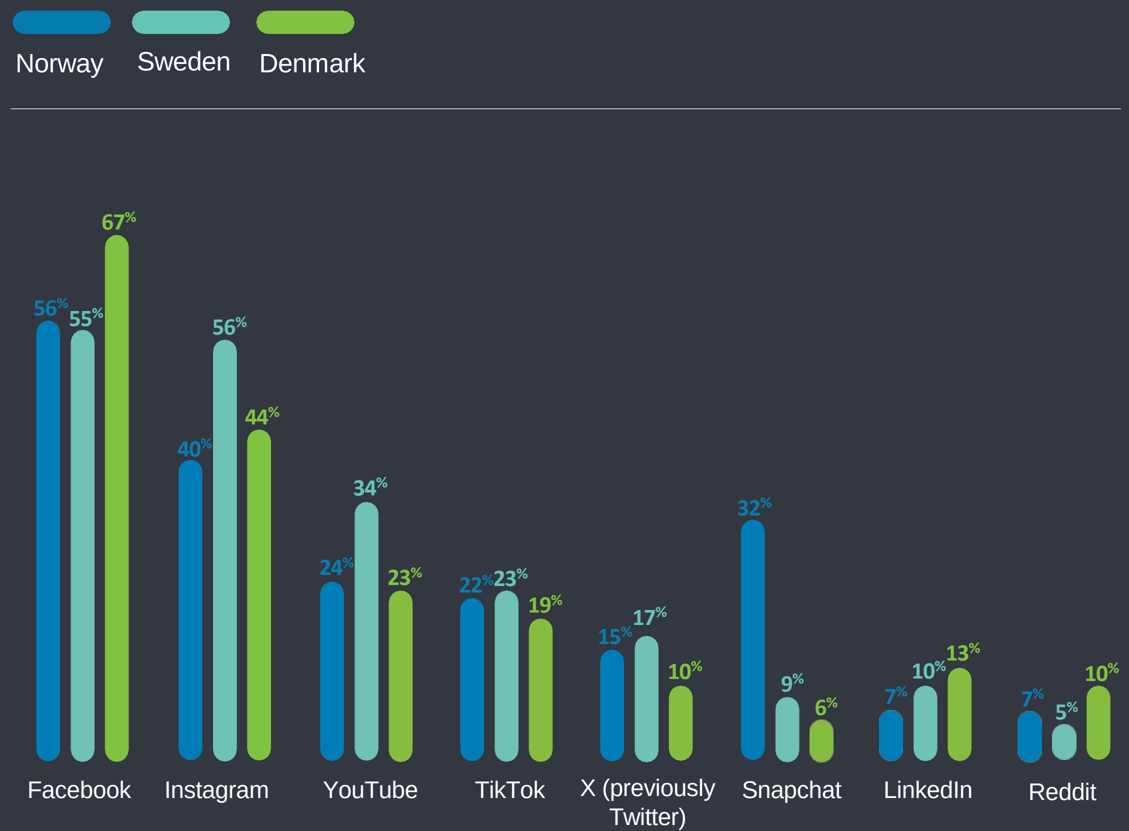
Which social media platforms are your most preferred to stay updated on news or current events? (Multiple choice question)

Preferences for social media news sources differ throughout Scandinavia

- In a cross-country comparison of the Scandinavian countries there are some notable differences when respondents answer to which social media platforms they prefer for news and current events.
- In Denmark, Facebook is the most preferred.
- Swedes put Instagram on the top.
- Norwegians rank Snapchat significantly higher than people in the neighboring countries. A possible explanation is successful Snapchat-specific efforts on local content from the leading digital newspaper VG.

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

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

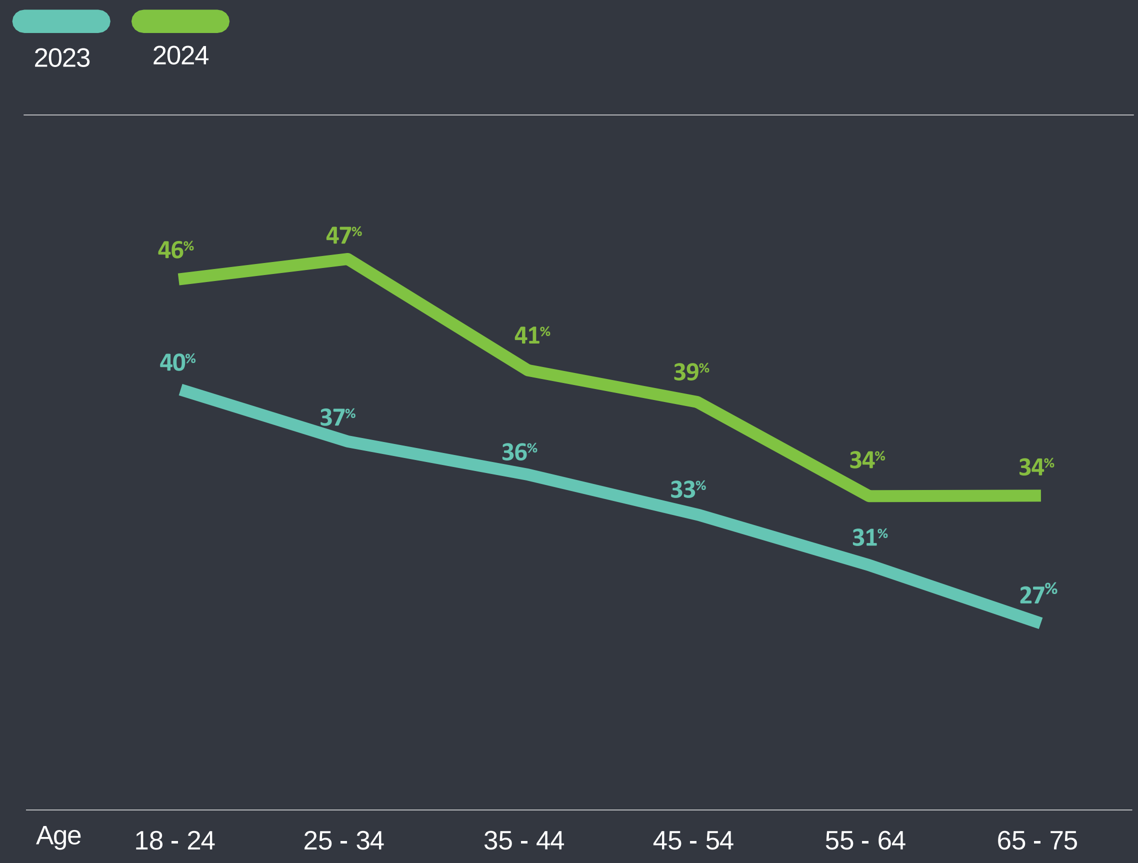


More fake news: Higher awareness or higher exposure in Scandinavia?

- In 2024, a rising number of people participating in this study reported that they are more exposed to misinformation or doctored material – often referred to as “fake news”.
- Younger age groups are experiencing this exposure more than older ones, but numbers are increasing across all ages compared to the previous year.

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”)

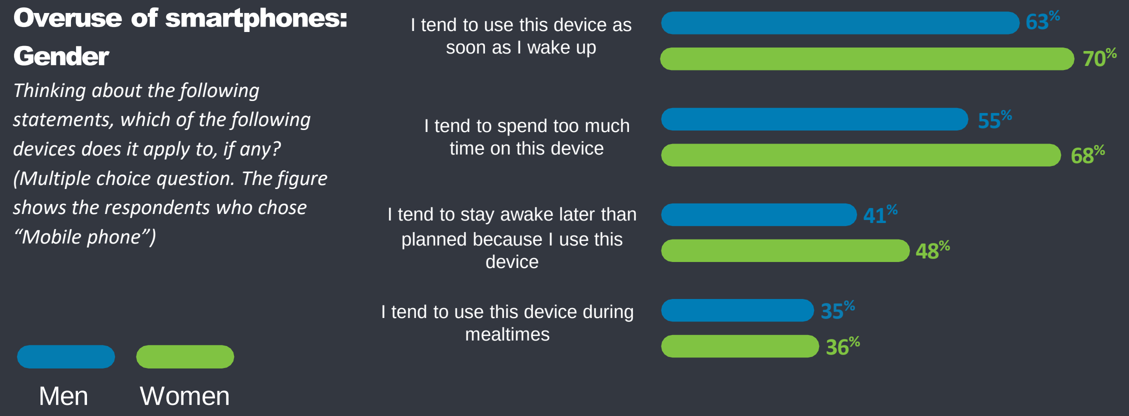


A majority feel they spend too much time on their phone

- In 2024, gender differences are notable:
  - 68% of women feel they spend too much time on their phones compared to 55% of men.
  - 48% of women report that phone use keeps them awake later than intended, compared to 41% of men.
- Looking at the yearly development, Scandinavian respondents show a heightened awareness of their mobile phone habits, with many recognizing potential overuse.
- 61% of users feel they spend too much time on their phones, a number that is slightly higher than a few years ago.

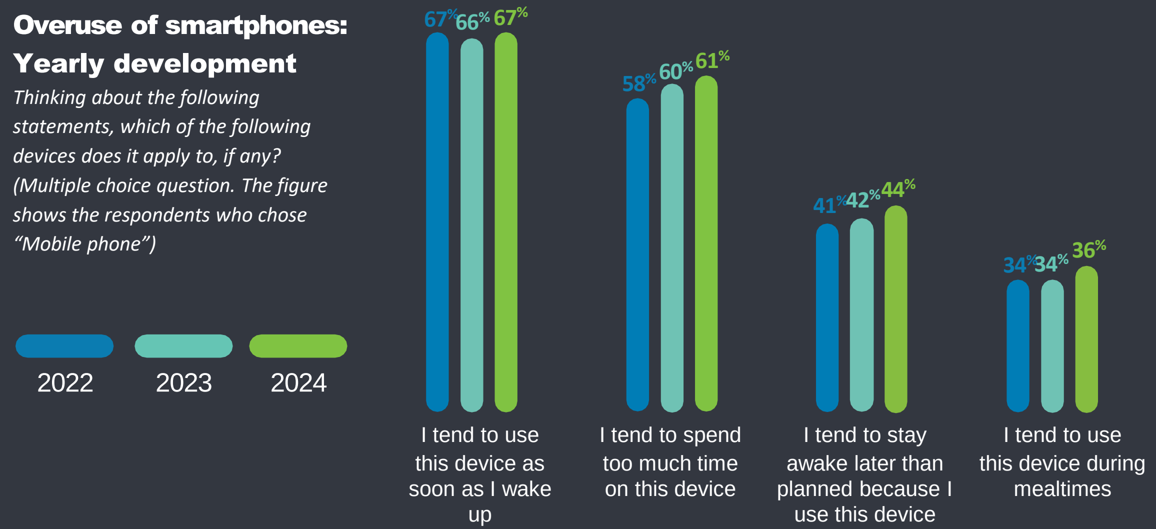
Overuse of smartphones: Gender

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



Overuse of smartphones: Yearly development

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



Bases

Chapter 1: Streaming is the new normal in Scandinavia

Slide 4: Base: All adults 18-75. Base size: 2022 (n=2,003) 2023 (n=1,981) 2024 (n=1,996).
Slide 5: Base: All adults 18-75. Base size: 18-24, 2021 (n=249) 25-34, 2021 (n=372) 35-44, 2021 (n=353) 45-54, 2021 (n=378) 55-64, 2021 (n=314) 65-75, 2021 (n=335) 18-24, 2024 (n=219) 25-34, 2024 (n=374) 35-44, 2024 (n=358) 45-54, 2024 (n=373) 55-64, 2024 (n=334) 65-75, 2024 (n=336).
Slide 6: Base: All adults 16-75. Base size: Norway (n=1,050) Sweden (n=2,003) Denmark (n=1,147).
Slide 7: Base: All adults 18-75. Base size: 18-24, 2022 (n=487), 2023 (n=464), 2024 (n=468), 25-34, 2022 (n=752), 2023 (n=776), 2024 (n=775), 35-44, 2022 (n=709), 2023 (n=699), 2024 (n=701), 45-54, 2021 (n=761), 2022 (n=758), 2023 (n=646), 2024 (n=745), 55-64, 2021 (n=652), 2022 (n=651), 2023 (n=676), 2024 (n=675), 65-75, 2022 (n=644), 2023 (n=633), 2024 (n=634).
Slide 8: Base: All adults 18-75. Base size: Norway, 2022 (n=1,000) 2023 (n=999) 2024 (n=1,050) Sweden, 2022 (n=1,908) 2023 (n=1,995) 2024 (n=2,003) Denmark, 2022 (n=1,092) 2023 (n=1,000) 2024 (n=1,147) Netherlands, 2022 (n=2,000) 2023 (n=2,000) 2024 (n=2,000) United Kingdom, 2022 (n=4,011) 2023 (n=4,000) 2024 (n=3,995) Italy, 2022 (n=2,000) 2023 (n=2,000) 2024 (n=2,000) Belgium, 2022 (n=2,000) 2023 (n=2,000) 2024 (n=2,000).
Slide 9: Base: All adults 18-75. Base size: Men, 2022 (n=2,017) women, (1,966) men, 2023 (n=2,015) women, 2023 (n=1,963) men, 2024 (n=2,015) women, 2024 (n=1,962).
Slide 10: Base: All adults 16-75. Base size: Norway (n=1,050) Sweden (n=2,003) Denmark (n=1,147).
Slide 11: Base: All adults 18-75. Base size: (Netflix, Viaplay, HBO Max, Disney+, Prime Video, C More, Discovery+, YouTube Premium: 2021 (n=2,092) 2022 (n=2,092) 2023 (n=2,089) 2024 (n=2,089). (TV Play DK): 2021 (n=1,092) 2022 (n=1,092) 2023 (n=1,090) 2024 (n=1,092). (TV Play NO): 2021 (n=1,000) 2022 (n=1,000) 2023 (n=999) 2024 (n=1,000).
Slide 12: Base: All adults 18-75. Base size: Base size: 2022 (n=4,000) 2023 (n=3,994) 2024 (n=3,999).
Slide 13: Base: All adults 18-75. Base size: Norway (n=1,000) Sweden (n=1,908) Denmark (n=1,092).
Slide 14: Top - Base: All adults 18-75. Base size: (Netflix, HBO Max and Disney+): 18-24 (n=444) 25-34 (n=715) 35-44 (n=647) 45-54 (n=721) 55-64 (n=678) 65-75 (n=678). (NRK TV): 18-24 (n=119) 25-34 (n=193) 35-44 (n=183) 45-54 (n=191) 55-64 (n=166) 65-75 (n=148). (SVT Play): 18-24 (n=132) 25-34 (n=265) 35-44 (n=261) 45-54 (n=276) 55-64 (n=262) 65-75 (n=261). (DRTV): 18-24 (n=71) 25-34 (n=108) 35-44 (n=117) 45-54 (n=143) 55-64 (n=140) 65-75 (n=126).
Bottom - Base: All adults 16-75. Norway (n=1,050) Sweden (n=2,003) Denmark (n=1,147).
Slide 15: Top - Base: All adults 16-75: Base size: (n=4,200).
Bottom - Base: All adults 16-75: Base size: Norway (n=1,050) Sweden (n=2,003) Denmark (n=1,147).
Slide 16: Base: All adults 16-75 who have subscribed to a AVOD in the last 12 months. Base 16-24 (n=468) 25-34 (n=775) 35-44 (n=701) 45-54 (n=745) 55-64 (n=675) 65-75 (n=634).
Slide 17: Base: All adults 16-75. Base size: n=4,200.

Chapter 2: From novelty to necessity: Gen AI finds a place in Scandinavian life

Slide 19: Base: All adults 16-75. Base size: 2023 (n=1,283) 2024 (n=4,200).
Slide 20: Base: Base: All adults 16-75. Base size: Norway 2023 (n=1,050) 2024 (n=1,050), Sweden 2023 (n=2,003) 2024 (n=2,003), Denmark 2023 (n=1,147) 2024 (n=1,147).
Slide 21: Base: All adults 16-75. Base size: 16-24, 2024 (n=608) 25-34, 2024 (n=789) 35-44, 2024 (n=713) 45-54, 2024 (n=758) 55-64, 2024 (n=687) 65-75, 2024 (n=645).
Slide 22: Top - Base: All adults 16-75. Base size: Men, 2023 (n=2,120) women, 2023 (n=2,063) men, 2024 (n=2,116) women, 2024 (n=2,059).
Bottom - Base: All adults 16-75 who have used any Gen AI tool. Base size: Men 2024 (n=1,018) women 2024 (n=774).
Slide 23: Base: All adults 16-75 who have used any Gen AI tool and who did not answer "Do not know". Base size: 2023 (n=1,283) 2024 (n=1,803).
Slide 24: Base: All adults 16-75 who have used any Gen AI tool and who did not answer "Do not know". Base size: Male (n=1,043), Female (n=1,748).
Slide 25: Base: All adults 16-75. Base size: (n=4,200).
Slide 26: Base: All adults 18-75. Base size: Norway, (n=999) Sweden, (n=1,995) The Netherlands, (n=2,000) Belgium, (n=2,000) Denmark, (n=1,000) United Kingdom, (n=4,000) Italy, (n=2,000).
Slide 27: Top - Base: All adults 16-75. Base size: 2023 (n=4,200), 2024 (n=4,200).
Bottom - Base: All adults 16-75 who are aware of any Gen AI tool. Base size: 16-24, (n=546) 25-34, (n=657) 35-44, (n=519) 45-54, (n=473) 55-64, (n=322) 65-75, (n=222).
Slide 28: Base: All adults 16-75 who have used any Gen AI tool. Base size: 2023 (n=1,303) 2024 (n=1,803).

Chapter 3: Shopping in Scandinavia: Trust and digital wallets lead the way

Slide 30: Base: All adults 16-75 Base size: 2024 (n=4,200).
Slide 31: Base: All adults 16-75. Base size: Male, (n=2,116) female, (n=2,059).
Slide 32: Base: All adults 16-75. Base size: Norway, (n=1,050) Sweden, (n=2,003) Denmark, (n=1,147).
Slide 33: Top - Base: All adults 16-75 who have access to a smartphone or smartwatch. Base size: 2023, (n=4,054) 2024 (n=4,052).
Bottom - Base: All adults 18-75 who have access to a smartphone or smartwatch. Base size: 18-24, 2023 (n=429), 2024 (n=453), 25-34, 2023 (n=749), 2024 (n=752), 35-44, 2023 (n=677), 2024 (n=677), 45-54, 2023 (n=726), 55-64, 2023 (n=649), 2024 (n=651), 65-75, 2023 (n=599), 2024 (n=606).
Slide 34: Base: All adults 16-75 who have access to a smartphone or smartwatch. Base size: 2023 (n=4,054) 2024 (n=4,052).

Chapter 4: Scandinavians uninformed about their carbon footprint, but still believe that action matters

Slide 36: Base: All adults 16-75. Base size: 2024 (n=4,200).
Slide 37: Base: Base: All adults 18-75. Base size: Norway, (n=999) Sweden, (n=2,000) Denmark, (n=1,000) United Kingdom, (n=3,095) Italy, (n=2,000) Belgium, (n=2,000) The Netherlands, (n=2,000).
Slide 38: Top - Base: Base: All adults 16-75. Base size: 2024 (n=4,200).
Bottom - Base: All adults 16-75. Base size: 16-24 (n=608) 25-34 (n=789) 35-44 (n=713) 45-54 (n=758) 55-64 (n=687) 65-75 (n=645).
Slide 39: Base: All adults 16-75. Base size: 2024 (n=4,200).
Slide 40: Base: All adults 16-75. Base size: Men (n=1,063) Women (n=1,023).

Chapter 5: TV, TikTok, and truth: How Scandinavian news habits are shifting in 2024

Slide 42: Base: All adults 18-75 Base size: 2022 (n=2,003) 2023 (n=2,013) 2024 (n=2,005).
Slide 43: Base: All adults 16-75 Base size: 16-24 (n=318) 25-34 (n=408) 35-44 (n=349) 45-54 (n=3799 55-64 (n=348) 65-75 (n=303).
Slide 44: Base: All adults 18-75 Base size: Norway (n=510), Sweden (n=952), Denmark (n=543), United Kingdom (n=4,150), Belgium (n=2,000), Italy (n=2,000), Netherlands (=2,000)
Slide 45: Base: All adults 18-75 where social media is preferred method to stay updated on news or current events. Base size: 2022 (n=631), 2023 (n=612) 2024 (n=614).
Slide 46: Base: All adults 18-75 where social media is preferred method to stay updated on news or current events. Base size: Norway (n=154), Sweden (n=276), Denmark (n=543).
Slide 47: Base: All adults 18-75. Base size: 18-24, 2023 (n=464), 2024 (n=249), 25-34, 2023 (n=776), 2024 (n=401), 35-44, 2023 (n=699), 2024 (n=343), 45-54, 2023 (n=746), 2024 (n=372), 55-64, 2023 (n=676), 2024 (n=342), 65-75, 2023 (n=633), 2024 (n=298).
Slide 48: Top - Base: All adults 16-75. Base size: Men (n=2,116) Women (2,059).
Bottom - Base: All adults 18-75. Base size: 2022 (n=4,000) 2023 (n=3,994) 2024 (n=3,999).

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