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## Introduction

This is a descriptive analysis of how young people use different types of media, and gives an insight into their attitudes and behavior as it is in January 2015. The sample is drawn from 3<sup>rd</sup> year students at the Bachelor's level at the Norwegian Business School. The total number of respondents was 404 out of 1163 possible students, which represents around 35% of the students at the campuses in Oslo and Bergen. They were recruited from the Facebook groups of the strategy course taught by the author of this report.

The report gives a snapshot into understanding the digital life of the young and how it influences their daily life.

It can be argued that an analysis like this cannot be representative of the young population as such since these students are all engaged in their studies at a business school. With high penetration of some of these media I believe that the differences are probably not very different from the rest of the population, but it should be kept in mind that this is not a representative sample as such.

75% of the students are born in the years 1990 to 1995 and the rest in the 1980s. 42% are male and 58% female. 70% of the sample comes from Oslo and 30% from Bergen.

## Media channel use in general

### What media/channels did you use yesterday?

Besvart: 404 Hoppet over: 0

Svarvalg	Svar
Facebook	93% 377
Internet (for news)	86% 347
Instagram or Snapchat	84% 339
TV	81% 328
News on mobile telephone	76% 307
Internet (for reference)	54% 219
Other on mobile (music/video/games)	48% 195
Radio	44% 177
News on tablet (iPad/Galaxy/Kindle)	22% 90
Newspaper (printed)	21% 86
Linkedin	20% 80
Games	19% 77
MSN Chat or other chat	17% 69
Twitter	16% 64
Book (not textbook for study)	13% 54
Video/DVD	13% 51
CD/Mp3	10% 42
Video-conversation (like Skype or FaceTime)	7% 30
Weekly magazine	4% 18
Trade/Industry publication	1% 6
No media	0% 0
Totalt antall respondenter: 404	

Table 1: Media channel use yesterday

As can be seen from this table it is a mix of concrete websites and more general labels. We see the large influence of the social media with Facebook on top with more than 90% daily penetration and Instagram/Snapchat on 3<sup>rd</sup> place. We also see that the hunger for news is there – with desktop penetration of 86% and mobile penetration of 76%. The printed paper comes on 10<sup>th</sup> place with 21% penetration.

## Time spent on different media

The following table shows the time spent on different media channels.

### What time approximately did you spend on every medium yesterday?

Besvart: 404 Hoppet over: 0

	Did not use	Less than 15 min	16-30 min	31-45 min	46-60 min	1 to 2 hrs	More than 2 hrs	Total
TV	12% 45	5% 18	10% 37	12% 45	16% 61	25% 97	20% 78	381
Facebook	2% 8	19% 75	28% 111	20% 78	13% 52	8% 31	10% 41	396
Internet (for reference)	29% 100	17% 60	16% 57	11% 37	9% 32	8% 29	10% 34	349
Internet (for news)	6% 22	18% 67	34% 127	19% 72	12% 47	6% 21	6% 22	378
Games	71% 222	4% 12	7% 21	3% 9	5% 16	4% 13	6% 20	313
Instagram or Snapchat	10% 37	27% 103	26% 100	14% 55	10% 40	8% 31	5% 18	384
Other on mobile (music/video/games)	40% 131	11% 37	16% 54	13% 44	9% 30	5% 17	5% 15	328
Video/DVD	80% 251	1% 4	3% 8	2% 6	3% 9	8% 24	4% 13	315
Radio	44% 151	15% 51	18% 63	11% 38	6% 22	4% 13	2% 8	346

Table 2: Time spent on different media

When you look at TV you spent time with it. 61% spend more than 45 minutes with the TV and 20% more than two hours. We also see that 31% spend more than 45 minutes a day on Facebook. And with a student group it is no big surprise that the internet is heavily used for reference. We also see that the internet is used quite heavily for news with 43% spending more than half an hour on newssites.

### What time approximately did you spend on every medium yesterday?

Besvart: 404 Hoppet over: 0

	Did not use	Less than 15 min	16-30 min	31-45 min	46-60 min	1 to 2 hrs	More than 2 hrs	Totalt
News on mobile telephone	16% 61	25% 93	27% 99	16% 58	9% 33	6% 21	2% 7	372
Book (not textbook for study)	78% 251	3% 9	6% 20	5% 15	3% 8	4% 12	2% 5	320
Video-conversation (like Skype or FaceTime)	86% 261	4% 11	4% 12	2% 6	1% 4	1% 3	2% 5	302
CD/Mp3	78% 243	4% 12	6% 18	5% 14	4% 11	3% 9	1% 4	311
News on tablet (iPad/Galaxy/Kindle)	67% 207	12% 38	10% 30	5% 16	3% 8	1% 4	1% 4	307
Twitter	78% 238	12% 36	5% 16	2% 7	2% 5	0% 1	1% 4	307
Newspaper (printed)	70% 242	16% 57	9% 30	1% 4	1% 5	1% 4	1% 4	346

Table 3: Time spent on media (part 2)

In the second part of this table we see that news on the mobile is used by 84% of the sample (this is higher than listed in Question 1 – probably because of how the question is formulated. We see that about a quarter of the students use the news on the mobile less than 15 minutes and another quarter between 15 and 30 minutes.

The printed newspaper is only used for a short time – most of the users read less than 15 minutes.

## Preferred channels for general and local news

### For news in GENERAL - what media channels are important to you? (Check all that apply)

Besvart: 404 Hoppet over: 0

Svarvalg	Svar
Internet (PC/Mac)	86% 347
Mobile (Phone/tablet)	84% 341
TV	61% 245
Social media (Facebook/Twitter/Instagram/Snapchat etc)	60% 241
Person-to-person communication (Phone/sms)	38% 152
Radio	22% 87
Printed newspaper	16% 63
Totalt antall respondenter: 404	
Kommentarer (9)	

Table 4: Channels for general news

For the general news the internet desktop and mobile are on top and TV as number three. We also see the role of social media as a general news provider with 60%. The printed paper is down at 16%.

### For LOCAL news - what media channels are important to you? (Check all that apply)

Besvart: 402 Hoppet over: 2

Svarvalg	Svar
Internet (PC/Mac)	80% 320
Mobile (phone/tablet)	58% 232
Social media	44% 175
Person-to-person communication (phone/sms)	37% 149
Printed newspaper	30% 121
TV	22% 87
Radio	13% 53
Other (please specify) <span style="float: right;">Svar</span>	0% 0
Totalt antall respondenter: 402	

Table 5: Channels for local news

When it comes to local news we see that websites are almost as important for local news as it was for general news, but the mobile is less important. So is the the social media. We can see that the printed newspaper plays a more important role, reflecting the classic position and role of the local newspaper. TV is much less important for local news. We also see that direct person-to-person communication as a news channel is almost equally important for local news and general news. The internet i.e. digital media has taken more or less completely over as the main channel of preference both for general and local news.

## The frequent use of social media

### How many times did you use social media sites yesterday?

Besvart: 403 Hoppet over: 1

	1-5 times	6-10 times	11-20 times	21-40 times	More than 40	Did not use	Totalt
Snapchat	28% 107	20% 78	21% 82	14% 54	8% 29	9% 36	386
Facebook	33% 132	31% 125	22% 90	10% 40	3% 12	1% 3	402
Instagram	35% 131	26% 99	11% 43	9% 36	3% 10	16% 60	379
Other	18% 54	4% 11	5% 16	3% 8	1% 3	70% 210	302
Twitter	21% 68	2% 6	2% 7	0% 1	0% 1	74% 242	325

Table 6: Use of social media

Social media is important- and it might be a surprise that snapchat is used more frequently than Facebook. This is probably due to the nature of the application where pictures are only displayed for a certain period of time. When it comes to Facebook we see that a third use it 1-5 times a day and 13% more than 20 times a day. Twitter is the social site that is less used – this is more regarded as a channel for the “professionals”.

## More than half have a new mobile

### How old is your mobile?

Besvart: 402 Hoppet over: 2

Svarvalg	Svar	
More than 12 months	46%	183
6-12 months	25%	101
Less than 3 months	15%	59
3-6 months	14%	58
Do not have/use mobile	0%	1
<b>Totalt</b>		<b>402</b>

Table 7: Age of the mobile phone

If we put the concept of a new mobile at one year we see that 54% of the students have a mobile that is less than a year old. This puts the change rate at about two years and this also means that most students have a mobile with capacity to use the most popular apps on the market – and video and photo. We also know from another question in the survey that 80% of the students have an iPhone and that 20% have an Android or other type phone.

## Social media first

### What is the FIRST thing you check on your mobile in the morning?

Besvart: 394 Hoppet over: 10

Svarvalg	Svar	
Social Media	40%	156
Text-messages	38%	149
E-mail	12%	46
News	11%	43
<b>Totalt</b>		<b>394</b>

Table 8: The first thing to check in the morning

They check the social media and text messages first when they get up in the morning. Emails and news is second.

## Checking for updates

It has been noted in the press lately that people check their mobile more than 100 times a day.

Our results shows this:

### How often do you normally check for updates on your mobile?

Besvart: 402 Hoppet over: 2

Svarvalg	Svar	
Every five minutes	4%	15
Every 15 minutes	24%	96
Every 30 minutes	28%	113
Every hour	32%	127
2-5 times a day	11%	46
More seldom	1%	5
<b>Totall</b>		<b>402</b>

Table 9: Checking for updates on the mobile

We have 4% of the students who say they check their mobile around every five minutes – this is 168 times on a 14 hour day. Depending on how we define how many hours used and the frequency we can see that our students on average check their mobile 33 times a day. (Time slots over 14 hours times percentage used). 24% of our sample check the mobile more than 50 times a day.

## Worries on identity theft and harassment

### Are you worried about any of these in your use of the internet?

Besvart: 399 Hoppet over: 5

Svarvalg	Svar	
Identity theft	42%	169
That your behaviour on the internet is logged	36%	143
Not worried	35%	141
That advertising is getting more personal	29%	114
Harrassment (mobbing)	10%	41
Totalt antall responder: 399		

We find that almost half are afraid of identity theft and almost as many are worried about their behavior on the net is logged. We find that 35% are not worried at all. 29% are worried about that the advertising is getting more personal. I believe that this is a tradeoff against the information on goods and services. Only 10% are worried about harassment. And the results are consistent across the sexes as well.

## Subscriptions to music services

### Do you subscribe to a music site like Spotify/Wimp?

Besvart: 404 Hoppet over: 0

Svarvalg	Svar	
Yes, a paid version	75%	302
Yes, a free version	11%	43
No	15%	59
Do not know	0%	0
Totalt		404

There is a surprising number here: 75% that are subscribing to a music service like Spotify and Wimp. And 11% have the free version. In other words – the consumption on music through streaming services has reached a very high level.

## Film is moving online

### I mostly watch film on..

Besvart: 402 Hoppet over: 2

Svarvalg	Svar	
the PC/Mac	77%	308
TV (through cable/satellite)	54%	219
Cinema	14%	55
DVD/BlueRay	12%	50
Tablet (iPad/Galaxy etc)	11%	43
Mobile	3%	12
Totalt antall respondenter: 402		

We see that the consumption on film has moved online to a large extent. The one not excluding the other – we see that 77% of the students mostly watch film on a desktop screen. And then TV is down at 54%. Not very many say that they are watching on tablet or mobile. The screen size can be a factor here.

## Shopping on the internet

**Digital shopping is growing. What kind of goods or services have you bought on the internet over the last year?**

Besvart: 397 Hoppet over: 7

Svarvalg	Svar
▼ Clothes	74% 295
▼ Tickets for events	64% 256
▼ Travel services	62% 247
▼ Music/film	38% 149
▼ Sports equipment	31% 124
▼ Electronics and cameras	28% 111
▼ Books	24% 97
▼ Insurance	24% 95
▼ Magazines	9% 34
Totalt antall respondenter: 397	

Shopping on the internet has reached a high level. For clothes this is up to 75%, and tickets and travel is also on high levels. Then there is a drop down to music and film and sports equipment.

There are gender differences here. The following table shows the difference and the yellow colour shows where it is statistically significant.

		Sex	
		Male	Female
		Column N %	Column N %
Digital shopping	Clothes	61%	83%
	Tickets for events	63%	66%
	Travel	60%	64%
	Music and film	36%	39%
	Sports equipment	37%	27%
	Electronics and cameras	37%	21%
	Books	22%	26%
	Digital shopping	27%	22%
	Insurance		
	Magazines	4%	11%
	Total	100%	100%

So females go for clothes and magazines, while the males go for sports equipment and electronics/cameras. These results are really not very surprising.

## The use of finn.no

### Have you been buying or selling on finn.no?

Besvart: 404 Hoppet over: 0

Svarvalg	Svar
Yes, selling	54% 219
Yes buying	44% 176
No	32% 129
Not relevant	1% 5
Totalt antall respondenter: 404	

We see that the Norwegian market leader on classifieds has a high market penetration. 54% have been selling and 44% been buying on finn. This is a very high result for a single provider of classifieds and shows the success of finn.no and the inclination to use it.

## Paying for digital content

### How willing are you to pay NOK 79 per month for a digital news subscription (more answers possible)?

Besvart: 401 Hoppet over: 3

Svarvalg	Svar
Not willing - there is so much free news out there.	82% 329
I would pay for general news	9% 37
I would pay for local news	3% 12
I would pay for special interest news	13% 52
Totalt antall respondenter: 401	

The willingness to pay for content can be viewed in several ways. The new thing about this question is that it is linked to a specific price – the price for a monthly subscription to Netflix. By imposing this comparison we find that the students are not very willing to pay for news – because there is so much free material out there. 82% think this. The results are disappointing for news providers on general and local news. The only area where there is a slightly higher willingness to pay is on the special interests. And there are no differences by males or females here. We do have some indications in our material that those that are subscribing to music sites also are more willing to pay for special interest news, but the results are not statistically conclusive.

## Conclusion

This report has given some insight into how young people (students at the Norwegian Business School) use different kind of media. We see that the use of digital media is on a very high level and that the mobile phone plays an important role in this. Also we can see that the social media – both

Facebook and the photo sharing applications like Snapchat and Instagram have a high influence on their digital behavior. While they are embracing streaming of music and film and even a high willingness to pay for some of this does not apply to the news – thus creating a tough challenge for the business side of the news industry.

Oslo, March 27<sup>th</sup>, 2015.

Erik Wilberg

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