



DISTRIBUTION AND VIEWING OF TELEVISION SERIES IN THE NORDIC COUNTRIES

A report prepared for Nordisk Film & TV Fond



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Executive summary

The report presents an analysis of the viewing of 19 series supported by Nordisk Film & TV Fond in Denmark, Iceland, Norway, and Sweden and two Finnish series, all produced between 2011 and 2016. The analyses are based on ratings for the series, and on interviews with schedulers and acquisition executives from the channels that have commissioned the 21 series. The report gives a comprehensive view of the scope and composition of the audiences to series supported by Nordisk Film & TV Fond, and extends these findings with insights into the organizational decisions that shape how the series reach their final audiences.

The analysis shows that the series supported by the Nordisk Film & TV Fond often reach large audiences, in particular when shown in the country in which they are produced. Some series do, however, reach large audiences outside of their country of production. The most viewed

series reach more than 3 million viewers across the Nordic countries. The ratings analysis also shows that viewers countries outside of the country of production tend to have higher levels of education, and that they are count slightly more women than men.

The report analyses ratings for digital distribution, and finds that up to 11% of the audience for the series view them online. This indicates the magnitude of the changes in viewing behavior that is currently taking place. The finding also suggests that while digital viewing has become an important platform for accessing content, it so far remains a supplement to broadcast television.

The analysis of scheduling indicates that the preference for national content to some extent stems from these series being scheduled in primetime slots on main channels in their native countries. The viewer interest in series from

other Nordic countries varies substantially between the countries, with Icelandic viewers being particularly fond of Nordic series in general.

The interview analysis points to substantial differences in the approaches taken to the scheduling and promotion of Nordic series. All the interviewed broadcasters work with designated Nordic drama slots, yet the prevalence and prioritization behind the scheduling of the series differ from broadcaster to broadcaster. While some will broadcast series from other Nordic countries in their legacy national drama slots, others reserve niche channels and late primetime for content other than national. This in turn shows in the ratings for the various series across broadcasters – the more Nordic series are prioritized the better the slot and the better the promotional package.

Data sources and methods

The report is based on data collected from a range of television stations in the Nordic countries. The data cover a total of 37 seasons of 21 series, broadcast between 2011 and March 2017 in the five Nordic countries (Denmark, Finland, Iceland, Norway, and Sweden). 19 of the 21 series were supported by Nordisk Film & TV Fond. Two Finnish series were included to provide a balanced view of national and Nordic audience patterns.

Ratings data have been collected from the television stations that have broadcast one or more of the series supported by the Fund. The ratings data for the analysis are aggregated as average ratings per broadcast season of a series, and do not include ratings for re-runs. A total of 106 rating measurements were collected, each reflecting the average rating (and a number of other dimensions) for a series run at any channel in the five countries.

In addition to television ratings data, the report also includes data on online viewing where these were available from broadcasters (Denmark [only DR], Norway [only NRK], Sweden, and Finland). Data on online ratings were collected using the measurement systems employed by the television stations in question. In total, 59 online rating measurements were collected, covering 56% of the 106 broadcast seasons. The number of online ratings available in part reflects differences in measurement practices between the five countries.

In addition to the quantitative data the report also includes interviews with key stakeholders from the stations which have commissioned one or more series. Interviews have been conducted with professionals involved in purchasing and/or scheduling of the 21 series, and reflects the choices and motivations that drive their decisions. The analysis elaborates on the ratings

analysis, since choices concerning scheduling often have definitive influence on ratings. The analysis also investigates the role of Nordic television fiction in different countries and between commercial and public service broadcasters. The interviews cover 8 broadcasters.

Two different audience measures are used:

Rating: Measures the average number of viewers who watch the series.

Share (%): Measures the percentage of current TV viewers, who watch the series.

Series, commissioning channels and interviewees

Country of prod.	Broadcaster	English Title	Original Title
Norway	NRK	The Heavy Water War	Kampen om tungtvannet
		Nobel	Nobel
		The Third Eye	Tredje Øyet
		Lilyhammer	Lilyhammer
	TV2	Acquitted	Frikjent
		Occupied	Okkupert
Iceland	RÚV	Trapped	Ófærð
Finland	YLE	Tellus	Tellus
		Bordertown	Sorjonen
Sweden	SVT	Midnight Sun	Midnattssol
		Springtide	Springfloden
		Jordskott	Jordskott
	Blue Eyes	Blå Ögon	
TV4	Modus	Modus	
Sweden/Denmark	SVT/DR	The Bridge	Bron/Broen
Denmark	DR	1864	1864
		Follow the money	Bedrag
		The Team	Mord uden grænser
	TV2	Norskov	Norskov
		Dicte - Crime Reporter	Dicte
		The Seaside Hotel	Badehotellet

The left-side table summarizes the 19 series, which have received financial support by Nordisk Film & TV Fond, and the two Finnish series. It covers a broad spectrum of titles across Nordic public service and commercial channels in the five countries – with a majority stemming from Norway, Denmark and Sweden.

From each of the commissioning channels of at least one of the 21 series, we have interviewed the people, listed in the table below, who work with acquisition of Nordic drama in order to contextualize the ratings data by discussing acquisition strategies, scheduling practices and promotion of the series.

Broadcaster	Interviewee	Title
TV2 Denmark	Anders Leifer	Senior Acquisitions Executive
DR	Bertel Kaare Schmidt	Acquisitions Executive, Fiction
TV2 Norway	Nina Lorgen Flemmen	Director of Aquisitions
NRK	Trine Fossen	Programme Acquisitions
TV4	Johanna Bergenstråhle	Executive Producer of drama and comedy
SVT	Stephen Mowbray	Head of International Acquisitions and Sales
YLE	Johan Förnäs	Acquisitions Executive
RÚV	Guðrún Helga Jónasdóttir	Head of Aquisitions

A photograph of two men standing on a rocky mountain peak. The man on the left is wearing a blue quilted jacket and dark pants, holding a red shovel. The man on the right is wearing a red jacket and dark pants, holding a wooden staff. The background is a dense forest of green trees under a bright sky. The text "Distribution and viewing in the Nordic countries" is overlaid in the center of the image.

Distribution and viewing in the Nordic countries

Dicte – Crime Reporter

Dicte (2012-2016)

The series chronicles the life of *Dicte*, who is a dedicated and stubborn crime reporter and also a single parent. Her refusal to give up on a story along with her sense of moral obligation to the journalistic field gets her into trouble again and again, as she challenges her boss, her colleagues and not least the chief police detective, John Wagner. Each season features the untangling of a Danish crime investigation, where Dicte ends up contributing to the solving of the case. The three seasons were produced for TV2/Denmark.

Performance

The series has been broadcast in all five countries. Notably, *Dicte* did really well in Iceland, with a share of 65%. The series received an average share of approximately 22% in Sweden, Norway, and Finland. As such, it performed better than other Nordic series in Finland, yet somewhat under average in Norway and Sweden. In comparison to the other Danish series in our sample, the national share of 38% is quite low.

When & where

The series was broadcast in primetime on the main commercial channels in Denmark, Sweden and Norway, whereas in Finland and Iceland it was aired on the main public service channels. Notably, it gained a share, which was higher than average for Nordic series on both YLE1 and RÚV. In contrast, the series performed below average on the three commercial channels in the remaining countries.

Genre: Crime
 Duration: 45 min
 Seasons/episodes: 3/30
 Commissioner: TV2
 Producer: Miso Film

Dicte - Crime Reporter/Dicte, Denmark

	Season	Release	Channel	Start time	Episodes	Rating	Share
Denmark	1	2012	TV2	20:00	10	1.277.000	49%
	2	2014	TV2	20:00	10	873.500	38%
	3	2016	TV2	20:00	10	777.000	38%
Finland	1	2016	YLE1	21:00	10	354.100	23%
Iceland	1	2013	RÚV	21:00	10	58.900	64%
	2	2015	RÚV	21:00	10	52.900	67%
Norway	1	2013	TV2	21:45	10	330.500	26%
	2	2014	TV2	21:45	10	374.800	23%
	3	2016	TV2	21:45	10	249.300	18%
Sweden	1	2013	TV4	21:00	10	942.000	26%
	2	2014	TV4	21:00	10	708.000	20%
	3	2016	TV4	21:00	10	618.000	18%

The Seaside Hotel

Badehotellet (2013-)

The Seaside Hotel is set in 1928-1933 and is located in the Danish North Sea sand dunes, where it hosts the story of both staff and guests. The light comedy historical drama follow an ensemble from both upstairs and downstairs quarters, yet centers on three characters that represent different layers in the hotel hierarchy: Fie, a hotel chambermaid, Amanda, the daughter of a merchant, and Morten, a local village fisherman. *The Seaside Hotel* was produced for TV2/Denmark.

Performance

The Seaside Hotel has been a national blockbuster, with shares above 60% in Denmark, and is TV2/Denmark's biggest drama success yet. In both Norway and Sweden, shares are above 20% and just slightly under average for the remaining Nordic series in the sample, whereas in Finland, the series received only a 3% share.

One possible explanation why the series performs particularly well in Denmark and average or below average in the other countries, is its particular representation of a Danish national past – a genre is more culturally specific and thus less translatable to foreign audiences. The series has not been broadcast in Iceland.

When & where

Both Sweden and Norway have bought all four seasons, and the buyers from the relevant broadcasters were expecting the series to continue to do well. *The Seaside Hotel* has been broadcast on the main Norwegian and Swedish commercial channels in prime- or late primetime.

Contrary, Finland has only recently bought the series (2016) and this was scheduled on the niche channel YLE Fem, which to an extent explains the low Finnish share (3%)

Genre: Historical
 Duration: 45 min
 Seasons/episodes: 4/6-7
 Commissioner: TV2/Denmark
 Producer: SF Studios Production

The Seaside Hotel/Badehotellet, Denmark

	Season	Release	Channel	Start time	Episodes	Rating	Share
Denmark	1	2013	TV2	20:00	6	1.556.700	59%
	2	2015	TV2	20:00	7	1.396.400	56%
	3	2016	TV2	20:00	7	1.580.000	64%
	4	2017	TV2	20:00	7	1.537.200	64%
Finland	1	2016	YLE Fem	20:00	6	38.500	3%
	2	2016	YLE Fem	20:00	7	80.600	4%
Norway	1	2014	TV2	22:35	6	381.500	27%
	2	2015	TV2	22:35	7	345.400	23%
	3	2016	TV2	22:35	7	323.100	25%
Sweden	1	2014	TV4	20:00	6	835.000	25%
	2	2015	TV4	21:00	7	667.100	19%
	3	2016	TV4	21:00	7	730.700	21%
	4	2017	TV4	21:00	7	700.000	18%
Iceland	Not shown						

1864

1864 (2014)

Danish historical drama *1864* centers on the period and events surrounding the Danish-German war in 1864. The eight-hour mini-series portrays the war and its consequences from various angles: the politicians, the landlords, the military officials, the rural working class, and the private soldiers. Serving as a narrative frame, the series also has a present-day storyline reflecting on the relation between past and present views on nationalism, warfare, and class society. The series was produced for DR, and with a budget of 23 million Euro, it was the most expensive drama production in the history of DR.

Performance

Although the series' national share was acceptable in a Danish context, it did drop continuously across the eight episodes, from above 1,7 to 1,1 million viewers. It received a mixed review from the public and stirred a nationwide cultural and political debate.

1864 was distributed to all other Nordic countries, where it had shares ranging from 10% to 15%, which, compared to other Nordic titles in each country, is quite low. As the series deals with an extremely important historical event in the Danish context, the lack of success in the remaining

Nordic countries can to an extent be explained by its national specificity, which is often the case with historical dramas.

When & where

Across all countries, the series was broadcast on main channels in primetime slots. It traveled to the commercial channels in Norway and Sweden, whereas Finland and Iceland's public service broadcasters aired the series.

In Sweden, *1864* only features four episodes, not because the show was cancelled, but because TV4 edited the series into four two-hour episodes rather than eight. This is a strategy that several broadcasters use with different series.

The tone and storytelling in the drama series 1864 skewed too much in the 'public service' profile versus our commercial channel identity. This too was reflected in the ratings we achieved which was below Nordic drama average (TV2 Norway)

Genre: Historical
Duration: 60 min
Seasons/episodes: 1/8
Commissioner: DR
Producer: Miso Film

1864/1864, Denmark

	Season	Release	Channel	Start time	Episodes	Rating	Share
Denmark	1	2014	DR1	20:00	8	1.400.900	52%
Finland	1	2015	YLE1	21:00	8	229.200	10%
Iceland	1	2014	RÚV	21:00	8	30.100	44%
Norway	1	2014	TV2	21:45	8	205.600	13%
Sweden	1	2015	TV4	21:00	4	380.000	15%

Norskov

Norskov (2015-)

Norskov is the home town of police inspector Tom Noack, who returns to the town with the task of cleaning up the invasive drug crime but instead stumbles on a smuggling operation. Struggling to navigate between professional and personal obligations, Tom finds himself not knowing who to trust. Untangling this crime, Tom has to choose between his job, his friends, and his family. The first season of series was produced for TV2 Denmark, and a new season has been commissioned.

Performance

As opposed to the TV2/Denmark production *The Seaside Hotel*, with a share of 31%, *Norskov* was not the success it was expected to be. Hence, production costs rendered a second season commercially unviable. NRK and TV4 were co-producers on the series, and they also commissioned *Norskov* in Norway and Sweden. With shares of 20% (Norway) and 14% (Sweden), the series performed below the average foreign share in both countries. The series has not been broadcast in Iceland and Finland.

When & where

Broadcast on respectively the main public service channel in Norway and the main commercial channel in Sweden, the only common denominator is the late primetime slot, where inevitably ratings are bound to be lower, yet still at primetime levels. In comparison to SVT, TV4 has acquired the majority of the Danish series in the sample, and they tend to have been commercial successes. As such, *Norskov* stands out with an overall lower share than other Danish series broadcast by the channel.

Genre: Crime
 Duration: 41 min
 Seasons/episodes: 1/10
 Commissioner: TV2/Denmark
 Producer: SF Studios Production

Norskov/Norskov, Denmark

	Season	Release	Channel	Start time	Episodes	Rating	Share
Denmark	1	2015	TV2	20:00	10	670.000	31%
Norway	1	2015	NRK1	22:30	10	303.000	20%
Sweden	1	2016	TV4	23:00	10	126.000	14%
Finland	Not shown						
Iceland	Not shown						

The Team

Mord uden grænser (2015)

The Team centers on the collaborative efforts of a team of investigators, the Dane Harald, the German Jackie, and the Belgian Alicia, associated with the International task force EUROPOL. The narrative transcends the borders of Europe as the investigators link the murders of women in different countries to the same villain and encounter the challenges as well as rewards of transnational collaboration. The series, which was a German-led co-production between several European countries including Denmark, where it aired on DR1.

Performance

Featuring one of the most famous Danish actors, Lars Mikkelsen, yet with a script that is more English, German, and Flemish than Danish, the series still managed to gain a national share of 46%, which enables it to compete on a national level with the remaining Danish titles. Remarkably, *The Team* gets an average share of 77% in Iceland, which leaves only 23% Icelanders with their TVs turned on viewing anything but this series at the time of broadcast. In contrast, the series did not achieve a comparably high share in

Sweden (15%), whereas in Norway its performance was average (26%). The series was not broadcast in Finland.

When & where

The Team was placed in the ‘prime of primetime’ on DR1 – the Danish legacy drama slot Sunday night at eight o’clock. However, although ratings above one million are high in a Danish context, compared to other Danish series in that particular slot, *The Team* did not gain the success of for instance *The Killing* or *Borgen*.

Without exception, public service broadcasters aired the series in either prime- or late primetime on their main channels. While other Danish series broadcast in Norway and Sweden had the advantage of audiences familiarized with Danish language and TV culture, *The Team* stands out as a European co-production with only a vague Danish imprint.

Genre: Crime
 Duration: 60 min
 Seasons/episodes: 1/8
 Commissioners: ZDF, SVT, Arte, ORF, DR, SRF, VTM
 Producer: Nordisk Film Production

The Team/Mord uden grænser, Denmark

	Season	Release	Channel	Start time	Episodes	Rating	Share
Denmark	1	2015	DR1	20:00	8	1.155.700	46%
Iceland	1	2016	RÚV	22:30	8	46.000	77%
Norway	1	2015	NRK1	21:30	8	448.600	26%
Sweden	1	2015	SVT1	22:00	8	420.000	15%
Finland	Not shown						

Follow the Money

Bedrag (2016-)

In the context of the fictional renewable energy company Energreen, *Follow the Money* centers on several key figures: Claudia, an ambitious female lawyer employed by Energreen, Alexander, Energreen's CEO, Mads, a police investigator working with industrial crime, and Nicky, a mechanic, who gets himself tangled up the shady affairs of the company. Both seasons were produced for DR – a third season is coming.

Performance

With half of all Danes, who had their TVs turned on, watching *Follow the Money* week after week, the series was a national success. This is also true for Iceland, where shares were even higher than in Denmark (66%). However, in neither Sweden nor Finland, did the series reach the levels that other Nordic titles managed. This is, considering the

universality of the crime genre as well as the particular topic of financial fraud, curious, when comparing the share to that of similar Danish crime series in the two countries. In Norway, *Follow the Money* reached a share of respectively 27% and 20% for season I and II.

When & where

With the exception of Finland, *Follow the Money* was broadcast on the major public service channels in all countries as well as in the primetime slot. Sweden and Finland have, however, not shown season II yet.

Genre: Crime
Duration: 60 min
Seasons/episodes: 2/10
Commissioner: DR
Producer: DR

Follow the Money has a more complicated narrative compared to other crime series and it requires more attention from the audience, which in turns means that ratings are less likely to go high (SVT).

Follow the Money/Bedrag, Denmark

	Season	Release	Channel	Start time	Episodes	Rating	Share
Denmark	1	2016	DR1	20:00	10	1.306.200	53%
	2	2016	DR1	20:00	10	1.087.800	48%
Finland		2016	YLE Fem	22:00	10	142.500	9%
Iceland	1	2016	RÚV	21:30	10	49.500	65%
	2	2016	RÚV	21:30	10	44.200	68%
Norway	1	2016	NRK1	21:30	10	403.000	27%
	2	2016	NRK1	21:30	10	342.100	20%
Sweden		2016	SVT1	21:00	10	550.000	17%

Lilyhammer

Lilyhammer (2012-2014)

Frank Tagliano is a former member of the New York mob. After testifying against his former boss, Frank is transferred to Lillehammer in Norway through the FBI witness protection program. The transition from renowned and feared mobster to unemployed immigrant in Lillehammer is, however, no walk in the park. Frank soon revisits his old ways by bribing and blackmailing his way to the top of the Norwegian village community. The three seasons are co-produced by NRK and Netflix.

This series emphasizes exactly how much Norway has moved in terms of drama production over the past years – this is definitely an all-time hit! (SVT)

Genre: Comedy/Crime
 Duration: 45 min
 Seasons/episodes: 3/8
 Commissioner: NRK, Netflix
 Producer: Rubicon TV

When & where

Lilyhammer aired in primetime on the main public service channels in both Sweden and Iceland, whereas Finland scheduled the series on the niche channel YLE Fem in late primetime. The series stands out in the 21-series sample, as it is the only title that is a co-production between a Nordic public service broadcaster and the commercial streaming service Netflix. The series was cancelled after its third season.

Performance

Lilyhammer has been broadcast in Norway, Sweden, Iceland, and Finland. In Norway, both seasons I and II did remarkably well, but by the third season the series' share dropped dramatically. Whereas Finland has aired all three seasons, Sweden aired only two seasons, and Iceland one. Although the 59% Icelandic share is remarkable, still, it is not high in comparison with other Nordic series in Iceland. In Sweden, the share drops from first (17%) to second (13%) season, which is not high in comparison with other Norwegian series' performances on Swedish TV. The ratings are likely influenced by the series being available for streaming on Netflix.

Lilyhammer/Lilyhammer, Norway

	Season	Release	Channel	Start time	Episodes	Rating	Share
Norway	1	2012	NRK1	21.35	8	1.060.000	55%
	2	2014	NRK1	21.35	8	845.000	47%
	3	2015	NRK1	21.40	8	567.000	30%
Finland	1	2012	YLE Fem	22.00	8	95.000	6%
	2	2014	YLE Fem	22.00	8	138.400	8%
	3	2015	YLE Fem	22.00	8	110.200	7%
Iceland	1	2013	RÚV	21.00	8	42.400	59%
Sweden	1	2012	SVT1	21.00	8	609.000	17%
	2	2014	SVT1	21.00	8	479.000	13%
Denmark	Not shown						

The Third Eye

Det Tredje Øyet (2014-2016)

The police detective Viggo Lust's daughter Christina goes missing without a trace and four years later, as Viggo struggles with his loss, he is given one last chance of getting himself together by his superior. Teamed up with the new detective Mari Friis, they set out to solve crimes together, yet Viggo is unable to leave Christina's old case behind. Both seasons were produced for TV2 Norway.

Performance

Out of all the Norwegian productions in the sample, both seasons of *The Third Eye* have the lowest shares on national TV (respectively 26% and 17%). In Sweden and Finland, the series too performed relatively lower than other Nordic series in the sample. The first season gained a 13-14% share in Sweden and Finland, while the second season was never aired in Sweden and only received a 4% share in Finland. Lastly, in Denmark the share was very low, at less than 5%.

The series was not broadcast in Iceland.

When & where

The Third Eye has only been distributed to commercial Nordic channels. Sweden, like Norway, aired the series in primetime and on the main channel. In Finland, the two seasons were placed on two different niche channels in primetime (Nelonen [season I], Liv [season II]). These broadcasters have not shown any of the remaining 20 series investigated in this report.

The Danish niche channel TV2 Charlie originally scheduled the series in late primetime, yet displaced the second season to three o'clock in the morning.

Genre: Crime
Duration: 45 min
Seasons/episodes: 2/10
Commissioner: TV2/Norge
Producer: Rubicon TV

The Third Eye is a classic case of buying something without knowing exactly where it goes. As such, I think this was acquired back in 2011, yet when we saw the final product, we had no clue where to put it (TV2/Denmark).

The Third Eye / Tredje Øyet, Norway

	Season	Release	Channel	Start time	Episodes	Rating	Share
Norway	1	2014	TV2	21.45	10	461200	26%
	2	2016	TV2	21.45	10	268500	17%
Denmark	1	2014	TV2 Charlie	22:00	10	79.300	5%
	2	2016	TV2 Charlie	03:00	10	2.100	3%
Finland	1	2015	Nelonen	21:00	10	215.900	13%
	2	2017	Liv	21:00	10	68.600	4%
Sweden	1	2015	TV4	21:00	10	351.000	14%
Iceland	Not shown						

Acquitted

Frikjent (2015-2016)

After 20 years as a successful businessman in Kuala Lumpur, Aksel Borgen returns to his hometown Lilfjord in Norway to help save the local key firm from bankruptcy. Before leaving Lilfjord 20 years earlier, Aksel was sentenced but also acquitted for murdering his highschool girlfriend. This return is an opportunity to both save the jobs that are at stake in the small town as well as to challenge and come to terms with the many people who still believe him to be guilty. There are two seasons and a total 18 episodes, all produced for TV2 Norway.

Performance

The series received an average share of 36% across both seasons in the home country of Norway. In Finland, season I had a high share of 21%, whereas season II gained only a 13% share. Both Sweden and Denmark have so far only acquired the first season of *Acquitted*, although it performed quite well in both countries. In Sweden, it gained a share of 27%, which is comparably good when it comes to Nordic drama other than national, while in Denmark, the share of 24% is in fact amongst the highest for Nordic series on Danish TV.

The series was not broadcast in Iceland.

When & where

With the exception of Sweden, *Acquitted* was broadcast on the main commercial channels in each country. Also, in all countries but Denmark, the series was scheduled in primetime, whereas on TV2 Denmark it was aired in late primetime at 22.30. This, however, should prove to be an actual favorable slot, since it had the all-time favorite dance-off program *Strictly Come Dancing* functioning as a lead-in to the series.

Although half past ten o'clock might seem like a late primetime slot, and so equal less viewers, in fact Acquitted was aired right after our viewer darling Strictly Come Dancing – so really, it couldn't have had a better lead-in (TV2/Denmark)

Genre: Crime
Duration: 45 min
Seasons/episodes: 2/10-8
Commissioner: TV2/Norge
Producer: Miso Film

Acquitted/Frikjent, Norway

	Season	Release	Channel	Start time	Episodes	Rating	Share
Norway	1	2015	TV2	21:45	10	639.000	36%
	2	2016	TV2	21:45	8	586.500	36%
Denmark	1	2015	TV2	22:30	10	340.400	24%
Finland	1	2015	MTV3	21:00	10	410.000	21%
	2	2016	MTV3	21:00	6	272.400	13%
Sweden	1	2015	SVT1	21:00	10	940.000	27%
Iceland	Not shown						

The Heavy Water War

Kampen on Tungtvannet (2015)

The Heavy Water War tells the story of the Norwegian “heroes of telemark” who sabotaged the heavy water factory in Rjukan used by the German forces for their nuclear weapon project. Leif Tronstad ventures to the United Kingdom to warn the allied of the immediate nuclear bomb threat. The six-episode mini-series was commissioned by NRK, and production costs were 8.7 million euro – nearly as much as TV2 Norway’s *Occupied*.

Performance

The series has been broadcast in all five countries with a share ranging from only 5% in Finland to a remarkable 65% in the homeland, Norway. Although a 50% share in Iceland is noticeable, it is not unusual when compared to the shares of other Nordic dramas broadcast in Iceland. In both Sweden and Denmark, the mini-series did remarkably well with one of the highest measured shares for any of the Nordic productions in the sample.

When & where

The Heavy Water War was broadcast in primetime and, with the exception of the Finnish niche channel YLE Fem, on the main channels. The mini-series was also only aired by public service broadcasters in the respective countries, except for Denmark, where it aired on TV2.

Genre: Historical
Duration: 45 min
Seasons/episodes: 1/6
Commissioner: NRK
Producer: Filmkameratene

The Heavy Water War/Kampen om Tungtvannet, Norway

	Season	Release	Channel	Start time	Episodes	Rating	Share
Norway	1	2015	NRK1	21:15	5	1.361.600	64%
Denmark	1	2015	TV2	20:30	6	395.700	23%
Finland	1	2015	YLE Fem	21:30	6	84.400	5%
Iceland	1	2015	RÚV	21:30	6	28.200	51%
Sweden	1	2016	SVT1	21:00	6	1.278.000	34%

Occupied

Okkupert (2015)

Set in the near future, *Occupied* is a political thriller that depicts how Russia, backed by the European Union, occupies Norway. The occupation occurs following an initiative to terminate all oil and gas production by the newly elected and environmentally concerned Norwegian government. The series was commissioned by TV2 Norway, and with a budget of nearly 10 million euro it is the most expensive Norwegian TV series to date.

Performance

The first season of *Occupied* has been shown in all the five Nordic countries. In Norway, Finland and Iceland, the series performed quite well compared to the other Nordic series in the sample. In Denmark and Sweden, however, the shares of only 7% and 12% are not impressive. The 35% share in Norway is acceptable, however ratings would continuously drop from first to last episode.

When & where

In Sweden and Iceland, the series was broadcast on the main public service channel in prime- or late primetime, whereas in Finland it aired on the main commercial channel. In contrast, the series was broadcast on niche public service channel in Denmark late at night.

Genre: Political drama
Duration: 45 min
Seasons/episodes: 1/10
Commissioner: TV2/Norge
Producer: Yellowbird Norge

This was one of those series that we bought on the basis of the script, and while this seemed like a good idea at the time, it turned out to be quite a different series from what we had expected (DR).

Occupied/Okkupert, Norway

	Season	Release	Channel	Start time	Episodes	Rating	Share
Norway	1	2015	TV2	22:15	10	532.800	35%
Denmark	1	2015	DR2	23:30	10	25.500	7%
Finland	1	2016	MTV3	21:00	10	318.700	15%
Iceland	1	2016	RÚV	22:30	10	34.500	66%
Sweden	1	2016	SVT1	21:30	10	342.000	12%

The Bridge

Bron/Broen (2011-)

The Öresund bridge that links Malmö and Copenhagen forms the point of departure for this crime series. It connects the odd detective couple Swedish Sage Norén and Danish Martin Rohde in the investigation of a grotesque murder where an oversaw body has been placed at the center of the bridge – half in Sweden, half in Denmark. All 30 episodes of *The Bridge* were produced for SVT and DR and a fourth season is on its way.

Performance

All three seasons have been broadcast in the five Nordic countries. In both Sweden and Denmark, the series only gained in share across the seasons. For Sweden, it went from 25% to 40%, and in Denmark from 30% to 38%. Contrary, in Norway and Iceland it dropped 10% point by the third season, while it increased slightly in Finland (25%-29%).

Genre: Crime
 Duration: 60 min
 Seasons/episodes: 3/10
 Commissioners: SVT, DR
 Producers: Filmlance, Nimbus

When & where

Without exception, *The Bridge* has been broadcast on the main public service channel in each of the five Nordic countries. Moreover, all but Finland placed it in primetime. Iceland, however, represents a special case when it comes to the scheduling of the series: The first season ran in late primetime, but the massive share

resulted in the series being rescheduled to primetime for the second season resulting in a 10.000 viewer increase, yet a drop in average share, as it suddenly competed with other primetime shows.

The Bridge/Bron/Broen, Sweden/Denmark

	Season	Release	Channel	Start time	Episodes	Rating	Share
Sweden	1	2011	SVT1	21:00	10	908.500	25%
	2	2013	SVT1	21:00	10	1.283.500	32%
	3	2015	SVT1	21:00	10	1.551.000	40%
Denmark	1	2011	DR1	20:00	10	736.900	30%
	2	2013	DR1	20:00	10	960.200	38%
	3	2015	DR1	20:00	10	894.700	38%
Finland	1	2013	YLE1	22:00	10	356.200	25%
	2	2013	YLE1	22:00	10	299.800	23%
	3	2015	YLE1	22:00	10	474.900	29%
Iceland	1	2012	RÚV	22:20	10	55.600	75%
	2	2013	RÚV	21:00	10	66.100	72%
	3	2015	RÚV	21:00	10	62.200	66%
Norway	1	2012	NRK1	22:00	10	646.300	41%
	2	2013	NRK1	21:30	10	650.500	34%
	3	2015	NRK1	21:30	10	614.900	31%

Jordskott

Jordskott (2015)

After years of absence, detective Eva Thörnblad returns to her hometown Silverhöjd, where seven years earlier, her daughter Josefine vanished. Josefine’s body was never found, but she was believed to have drowned in a lake by the woods. Eva returns to take over the legacy timber company from her father, and as another disappearance has now occurred, this time of a boy, she sets out to link and solve the cases of the kidnapped children. The series was produced for SVT.

Performance

The first season of *Jordskott* did very well in its homeland of Sweden where it had an average of 1,3 million viewers and a share at 35%. In contrast, the series did not come through in neither Norway nor Finland, where shares averaged at 15% on TV2 and 8% on YLE Fem. The series was not shown in Denmark or Iceland.

When & where

Jordskott aired in primetime on the main public service channel in Sweden. The main commercial channel in Norway first broadcast the series in late primetime, yet after the fifth episode, they reschedule the series for primetime. In Finland, the series was broadcast on the niche channel YLE Fem in primetime. Although the series has not yet been shown in Denmark, it has been acquired by the public service broadcaster DR.

Genre: Crime
 Duration: 60 min
 Seasons/episodes: 1/10
 Commissioner: SVT
 Producer: Palladium Film

Jordskott/Jordskott, Sweden

	Season	Release	Channel	Start time	Episodes	Rating	Share
Sweden	1	2015	SVT1	21:00	10	1.283.000	35%
Finland	1	2015	YLE Fem	21:00	10	141.800	8%
Norway	1	2015	TV2	21:45	10	202.800	15%
Denmark	Not shown						
Iceland	Not shown						

Modus

Modus (2015-)

Psychologist and profiler Inger Johanne Vik is drawn into the investigation of a number of unsettling deaths in Sweden, as her autistic daughter witnesses a contract murder. Detective Ingvar Nyman from the Swedish national police force is relocated to Uppsala to investigate the disturbing murder of a female bishop on Christmas eve. Inger Johanne soon starts to notice a pattern in the many deaths and she and Ingvar set out to solve the murder puzzle. The first season of *Modus* was produced for TV4.

Performance

Modus has been broadcast in all five countries and has generally received high audience ratings and shares. In the homeland, Sweden, the share of 29% amounts to more than a million viewers. Even though shares in the remaining countries range from 12% to 70%, the series has been well received in each country, when compared to other Nordic titles – especially in the case of the Icelandic and Finnish audiences.

When & where

With the exception of Iceland, *Modus* has been aired on commercial main channels, and for all countries, in primetime. In Denmark, which is where *Modus* receives the lowest average share, the series was competing with the long-running audience favorite *X-factor* on DR1 Fridays at 20.00. As such, the scheduling of *Modus* in that particular competitive slot explains the low audience ratings. The second season of the series is produced as a C More original and is scheduled to premiere exclusively on the streaming service in the autumn and later to be broadcast on TV4.

Genre: Crime
Duration: 60 min
Seasons/episodes: 1/8
Commissioner: TV4
Producer: Miso Film

Modus/Modus, Sweden

	Season	Release	Channel	Start time	Episodes	Rating	Share
Sweden	1	2015	TV4	21:00	8	1.041.000	29%
Denmark	1	2016	TV2	20:30	8	271.100	12%
Finland	1	2016	MTV3	21:00	8	396.200	20%
Iceland	1	2016	RÚV	21:00	8	46.600	70%
Norway	1	2016	TV2	21:45	8	387.800	23%

Springtide

Springfloden (2016)

The young police academy student Olivia Rönning gets the task of studying a 25-year old cold case. In 1990 an unknown pregnant woman was brutally murdered – drowned in springtide and buried on a beach in Sweden. As Olivia gets ever more engaged in the case, she encounters Tom Stilton, who ran the murder investigation back in the 90s, only to eventually suffer a mental breakdown and now lives as a homeless. The series was produced for SVT.

Performance

Amongst the Swedish series in the sample, *Springtide* has the highest national ratings (1,4 million) and share (38%). Moreover, in Finland and Norway it gained an equally impressive share – in Norway only season I of *The Bridge* exceeds the share of 37% by 3% points, while in Finland the 29% share is a tie between *Springtide* and *The Bridge* season III. At the time of writing, only one episode has been broadcast on DR2 in Denmark. It received a 10% share, which is more than acceptable for a smaller channel. The series was not broadcast in Iceland.

When & where

Across all four countries, the series has been aired on public service channels, however, whereas Sweden, Finland, and Norway placed *Springtide* on the main channel in primetime, Denmark placed the series on the niche channel DR2, which generally speaks to a more niche-oriented audience, also when it comes to foreign drama.

On DR2 we have series with a more cultural or historic debt or relevance. It is not the same audience who watches Beck or Wallander on DR1 and series such as Springtide, Homeland (US) or French productions on DR2 (DR).

Genre: Crime
 Duration: 45 min
 Seasons/episodes: 1/10
 Commissioner: SVT
 Producer: Filmlance

Springtide/Springfloden - liget i sandet, Sweden

	Season	Release	Channel	Start time	Episodes	Rating	Share
Sweden	1	2016	SVT1	21:00	10	1.437.000	38%
Denmark	1	2017	DR2	20:00	5	19.400	9%
Finland	1	2016	YLE1	22:00	10	454.500	29%
Norway	1	2016	NRK1	21:30	10	441.100	37%
Iceland	Not shown						

Midnight Sun

Midnattssol (2016)

Against the backdrop of the murder of a French citizen in Sweden, the French homicide detective Kahina Zadi journeys from Paris to the Swedish town Kiruna. She teams up with the Swedish Chief Prosecutor Rutger Burlin, and they embark on an investigation that turns out to be of massive proportions. Soon Kahina and Rutger witness another disturbing murder. The series was produced for SVT.

Performance

At the time of writing, *Midnight Sun* has only been broadcast in its home country of Sweden. Here, it had an overall impressive welcoming with almost 1,4 million viewers for each episode. This equals a share of 36%, which is more than the other Swedish series in the sample, and only matched by the series *Springtide*.

When & where

Midnight Sun was broadcast on the main public service channel in Sweden in primetime. In Denmark, the series was at first acquired for the Danish niche public service channel DR2, yet DR rescheduled the series to premiere on the main channel in late primetime over the course of a national holiday (premiere: DR1, 22:30 on the 12th of May 2017).

We buy so much good stuff for the DR2 timeslots, and some of it definitely has the appeal for a broader DR1 audience, so Midnight Sun was actually given a chance and will be released on DR1 soon (DR).

Genre: Crime
 Duration: 60 min
 Seasons/episodes: 1/8
 Commissioners: Canal+, SVT
 Producer: Nice Drama

Midnight Sun/Midnattssol, Sweden

	Season	Release	Channel	Start time	Episodes	Rating	Share
Sweden	1	2016	SVT1	21:00	8	1.384.000	36%
Denmark	1	2017	DR1	Forthcoming			
Finland	1	2017	MTV3	Forthcoming			
Norway	1	2017	NRK	Forthcoming			
Iceland	Not shown						

Tellus

Tellus (2014)

The environmental activist group Tellus, led by Eevi Forsman, engages in an increasingly radical “eco-terrorism” in order to protect the environment. The criminal endeavours are targeted by the detective Taneli Lokka, who has his own idea of how to “save the earth”. The series was produced for YLE.

Performance

Tellus gained a 22% share in Finland, with ratings averaging around 466.000. This is less than the other series from Finland in the sample (*Bordertown*), yet one fifth of all Finnish viewer were still tuned into *Tellus* at the time of broadcast. In Sweden, the series had an unimpressive 4% share and only 55.000 viewers in average.

The series was not broadcast in Denmark, Iceland, and Norway.

When & where

All six episodes were broadcast in primetime on the main public service channel in Finland. The Swedish niche public service channel SVT2 aired the series in late primetime. Considering that all other Nordic drama series broadcast by SVT have been scheduled on the main channel and primarily in primetime, *Tellus* is an unusual case for SVT.

Genre: Political drama/crime
 Duration: 50 min
 Seasons/episodes: 1/6
 Commissioner: YLE
 Producer: YLE

Tellus/Tellus, Finland

	Season	Release	Channel	Start time	Episodes	Rating	Share
Finland	1	2014	YLE1	21:00	6	466.000	22%
Sweden	1	2015	SVT2	22:30	6	55.000	4%
Norway	1	2017	NRK	Forthcoming			
Denmark	Not shown						
Iceland	Not shown						

Bordertown

Sorjonen (2016)

The respected and successful Detective Inspector Kari Sorjonen decides to leave his life behind and move his family to the quiet bordertown Lappeenranta near Russia, in order to live a calm life with his wife who only recently survived an attack of brain cancer.

Life on the border is, however, not calm at all, and as prostitution, murders, drug and human trafficking, and rapes peak out from dark hiding places, Kari is once again working to fight crime. The series was produced for YLE.

Performance

Bordertown is the only title in the sample of the 21 Nordic series, which received a share above 30% in Finland. As such, with its 677.000 viewers across all 11 episodes, *Bordertown* can be regarded as a Finnish blockbuster.

At the time of writing, the series has not been broadcast in any of the other Nordic countries.

When & where

The series was broadcast on the main public service channel in primetime in Finland. The first episode had a remarkable 43% share, but following this the series had lower ratings and shares, which eventually amounted to the average 31% share. *Bordertown* has, however, been sold to Netflix and has been available digitally in all five countries since April 2017.

Genre: Crime
Duration: 60 min
Seasons/episodes: 1/11
Commissioner: YLE
Producer: Fisher King Production

Bordertown/Sorjonen, Finland

	Season	Release	Channel	Start time	Episodes	Rating	Share
Finland	1	2016	YLE1	21:00	11	676.600	31%
Sweden	Not shown						
Norway	Not shown						
Denmark	Not shown						
Iceland	Not shown						

Trapped

Ófærð (2016)

In the remote Icelandic town of Seyðisfjörður, *Trapped* features a murder investigation set against the backdrop of a burgeoning snow blizzard. A mutilated body is caught in a fisherman's net, and Andri, the town's chief of police, initiates the investigation into the murder. Although detectives from the capital, Reykjavik, are supposed to take over the inquiry, Andri and his colleagues are left to themselves, as the powerful blizzard prevents the Reykjavik team from reaching Seyðisfjörður. The series was produced for RÚV.

Performance

In Iceland, *Trapped* had a remarkably large audience at almost 150.000, only leaving 13% of the Icelanders watching any other program while *Trapped* aired. In Norway, the 28% share amounts to a foreign TV success, whereas in Denmark, the 12% share is high compared to the other non-domestic, Nordic series in the sample. In Finland *Trapped* had a 10% share, while in Sweden it was 14%.

When & where

Trapped was broadcast on the main public service channels in primetime in Iceland, Norway and Sweden. An odd observation, is how the series triumphed on NRK1 and failed on SVT1. Similarly, for both Denmark and Finland, where the series was broadcast on the niche channels DR2 and YLE Fem, *Trapped* did, by all comparisons, remarkably well.

One title, which seems to have worked well for everyone else, is Trapped. I don't know exactly why it didn't work out on SVT1, but it must have been a language issue (SVT)

Genre: Crime
Duration: 50 min
Seasons/episodes: 1/10
Commissioner: RÚV
Producer: RVK Studios

Trapped/Ófærð, Iceland

	Season	Release	Channel	Start time	Episodes	Rating	Share
Iceland	1	2016	RÚV	21:00	10	146900	87%
Denmark	1	2016	DR2	20:30	5	245000	12%
Finland	1	2016	YLE Fem	22:00	10	154000	10%
Norway	1	2016	NRK1	21:30	10	483600	28%
Sweden	1	2016	SVT1	22:00	10	281000	14%

Series comparison

The overview of the 21 series above emphasizes that the share reached by the series differ substantially. The figure (right) shows the magnitude of these differences by mapping the spread of the shares achieved by each series across seasons and countries.

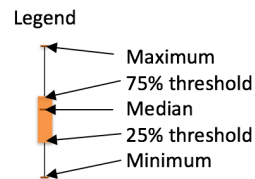
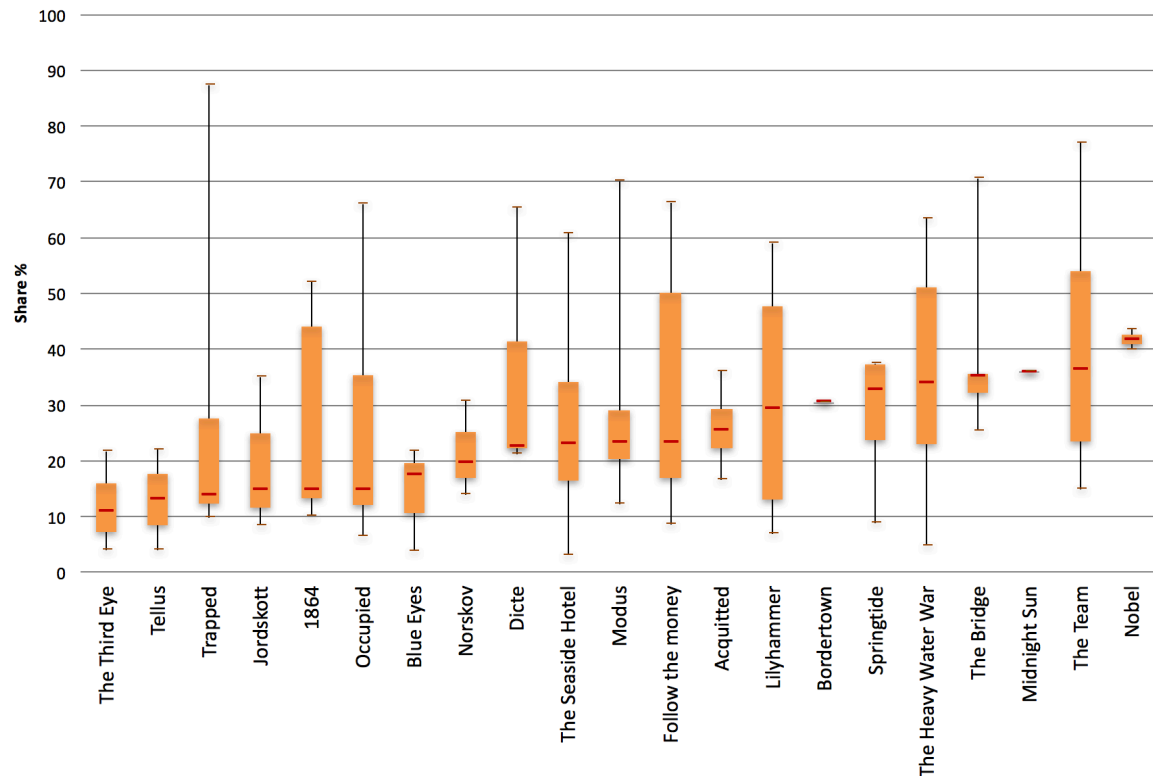
The median share across all seasons is 26%, and eight of the 21 series have median shares above 26% while 12 have median shares below 26%.

It is relevant to note the extent of variation in the shares that different series reach. For example, *The Seaside Hotel* has reached shares as high as 64% (season 3 and 4 in Denmark) and just 3% (season 1 in Finland). In comparison, *Norskov* has reached between 14% (season 1 in Finland) and 31% (season 1 in Denmark).

The figure indicates that many of the series reach very different audience shares across seasons and countries. A major contributing factor is a pronounced and well-known tendency for series to do substantially better in their domestic market than in the other Nordic countries.

The differences also stem from broader differences in audience preferences (for example for different genres), as well as large differences in the marketing and scheduling of the series. These differences are analyzed in the sections with country comparisons and Reflections on Nordic drama below.

Distribution of shares for all seasons of all series



Country analysis



Denmark

Nordic drama series on Danish broadcast TV

The two legacy broadcasters in Denmark, DR1 and TV 2, account for the entire corpus of Danish series in the sample. It is, without exception, the national content that gains the highest audience ratings, whereas series from the remaining Nordic countries never exceed a 30% share.

Ranging from 670.000 to 1.6 million viewers, the seven Danish series manage to attract 30% to 64% shares – that is, between one and two thirds of all Danes watching TV at the time of broadcast.

The main commercial channel, TV2, hosts the two most popular Nordic series in a Danish context – the Norwegian series *Acquitted* and *The Heavy Water War*.

Looking at the bottom six Nordic series, besides *Modus*, all were scheduled on DR2 and TV2 Charlie – the niche public service and commercial channels, respectively. In spite of an unfamiliar Icelandic language and the generally low share of a niche channel, the series *Trapped* stands out with a quarter of a million viewers and a 12% share. The two Norwegian series *Occupied* and *The Third Eye* and the Swedish *Blue Eyes* did not do well on Danish TV.

English Title	Original Title	Country of prod.	Season	Year	DK Release	Channel	Start time	Episodes	Rating	Share
The Seaside Hotel	Badehotellet	Denmark	1	2013	2013	TV2	20:00	6	1.556.950	59%
			2	2015	2015	TV2	20:00	7	1.396.429	56%
			3	2016	2016	TV2	20:00	7	1.580.043	64%
			4	2017	2017	TV2	20:00	4	1.537.200	64%
Follow the money	Bedrag	Denmark	1	2016	2016	DR1	20:00	10	1.306.170	53%
			2	2016	2016	DR1	20:00	10	1.087.840	48%
1864	1864	Denmark	1	2014	2014	DR1	20:00	8	1.400.888	52%
Dicte	Dicte	Denmark	1	2012	2012	TV2	20:00	10	1.277.170	49%
			2	2014	2014	TV2	20:00	10	873.530	38%
			3	2016	2016	TV2	20:00	10	776.740	38%
The Team	Mord uden grænser	Denmark	1	2015	2015	DR1	20:00	8	1.155.688	46%
The Bridge	Broen	Denmark/Sweden	1	2011	2011	DR1	20:00	10	736.980	30%
			2	2013	2013	DR1	20:00	10	960.180	38%
			3	2015	2015	DR1	20:00	10	894.690	38%
Norskov	Norskov	Denmark	1	2015	2015	TV2	20:00	10	669.570	31%
Acquitted	Frikjent	Norway	1	2015	2015	TV2	22:30	10	340.370	24%
The Heavy Water War	Kampen om tungtvannet	Norway	1	2015	2015	TV2	20:30	6	395.733	23%
Trapped	Ófærð	Iceland	1	2016	2016	DR2	20:30	5	245.300	12%
Modus	Modus	Sweden	1	2015	2016	TV2	20:30	8	271.100	12%
Springtide	Springfloden - liget i sandet	Sweden	1	2016	2017	DR2	20:00	1	191.300	10%
Occupied	Okkupert	Norway	1	2015	2015	DR2	23:30	11	25.545	7%
The Third Eye	Tredje Øyet	Norway	1	2014	2014	TV2 Charlie	22:00	10	79.320	5%
			2	2016	2016	TV2 Charlie	03:00	10	2.140	3%
Blue Eyes	Blå Ögon	Sweden	1	2014	2015	DR2	21:00	10	86.570	4%

Norway

Nordic drama series on Norwegian broadcast TV

In the Norwegian context, it is important to note that in recent years, Norwegian series have increased in quantity and in foreign success. That is, a few years ago, Norwegian series rarely travelled far outside Norway.

The *Heavy Water War* proved to be a tremendous success. As the only series in the sample that attracted more than a million Norwegian viewers, the series got a 64% share. Notably, the seven titles following *The Heavy Water War* include Danish, Swedish, and Icelandic productions across both legacy broadcasters in Norway, NRK1 and TV2. As a matter of fact, the table reflects a strong tendency for Norwegian audiences to appreciate quality Nordic series, thus overcoming barriers of language and cultural differences. In contrast, Danish and Swedish audiences seem to favor national content before Nordic.

The remaining series do, by all comparisons, really well across both legacy broadcasters – none are broadcast on niche channels. One title that stands out in an otherwise entirely Danish or Swedish group of series, is the Norwegian *The Third Eye*, where season II did not reach the levels of the first season. The least successful series are *Blue Eyes* and *Jordskott* (SE) as well as *1864* (DK) with shares below 20%.

English Title	Original Title	Country of prod.	Season	Year of prod.	NO Release	Channel	Start time	Episodes	Rating	Share
The Heavy Water War	Kampen om tungtvannet	Norway	1	2015	2015	NRK1	21:15	5	1.361.600	64%
Lilyhammer	Lilyhammer	Norway	1	2012	2012	NRK1	21:40	8	1.060.000	55%
			2	2013	2013	NRK1	21:35	8	845.000	47%
			3	2014	2014	NRK1	21:35	8	567.000	30%
The Bridge	Broen	Denmark/Sweden	1	2011	2012	NRK1	22:00	10	646.300	41%
			2	2013	2013	NRK1	21:30	10	650.500	34%
			3	2015	2015	NRK1	21:30	10	614.900	31%
Nobel	Nobel	Norway	1	2017	2017	NRK1	21:15	6	762.000	40%
Springtide	Springfloden - liget i sandet	Sweden	1	2016	2016	NRK1	21:30	10	441.100	37%
Acquitted	Frikjent	Norway	1	2015	2015	TV2	21:45	10	639.000	36%
			2	2016	2016	TV2	21:45	8	586.500	36%
Occupied	Okkupert	Norway	1	2015	2015	TV2	22:15	10	532.800	35%
Trapped	Ófærð	Iceland	1	2016	2016	NRK1	21:30	10	483.600	28%
			1	2013	2014	TV2	22:35	6	381.500	27%
			2	2015	2015	TV2	22:35	7	345.429	23%
The Seaside Hotel	Badehotellet	Denmark	3	2016	2016	TV2	22:35	7	323.143	25%
			1	2016	2016	NRK1	21:30	10	403.000	27%
Follow the money	Bedrag	Denmark	2	2016	2016	NRK1	21:30	10	342.100	20%
			1	2015	2015	NRK1	21:30	8	448.625	26%
The Team	Mord uden grænser	Denmark	1	2014	2014	TV2	21:45	10	461.200	26%
			2	2016	2016	TV2	21:45	10	268.500	17%
The Third Eye	Tredje Øyet	Norway	1	2012	2013	TV2	21:45	10	330.500	26%
			2	2014	2014	TV2	21:45	10	374.800	23%
			3	2016	2016	TV2	21:45	10	249.300	18%
Modus	Modus	Sweden	1	2015	2016	TV2	21:45	8	387.750	23%
Norskov	Norskov	Denmark	1	2015	2015	NRK1	22:30	10	302.600	20%
Blue Eyes	Blå Ögon	Sweden	1	2014	2015	TV2	21:50	10	232.900	17%
Jordskott	Jordskott	Sweden	1	2015	2015	TV2	21:45	13	202.769	15%
1864	1864	Denmark	1	2014	2014	TV2	21:45	8	205.625	13%

Sweden

Nordic drama series on Swedish broadcast TV

SVT1 hosts six of the seven most popular series in a Swedish context within the sample – Modus on TV4 being the exception. Swedish series dominate this top. However, the Norwegian series The Heavy Water War and Acquitted, which were also the most popular Nordic series in Denmark, were able to compete on shares with the national content.

On TV4, the first seasons of the two Danish TV 2 productions Dicte and The Seaside Hotel did particularly well with a 25% share. However, both series follow a similar pattern of declining shares season after season.

In contrast, Danish series from DR inhabit the bottom of the table with shares less than 20% on both SVT1 and TV4. Also, the Norwegian series Lilyhammer, The Third Eye, and Occupied along with the Icelandic Trapped figure in the bottom group of series.

Lastly, the only series in the sample to be broadcast on a Swedish niche channel is also the only Finnish title; Tellus. This scheduling has obvious consequences for its rating (55.000) and share (4%).

English Title	Original Title	Country of prod.	Season	Year of prod.	E Release	Channel	Start time	Episodes	Rating	Share
			1	2011	2011	SVT1	21:00	10	908.500	24%
The Bridge	Broen	Denmark/Sweden	2	2013	2013	SVT1	21:00	10	1.283.500	32%
			3	2015	2015	SVT1	21:00	10	1.551.000	40%
Springtide	Springfloden - liget i sandet	Sweden	1	2016	2016	SVT1	21:00	10	1.437.000	38%
Midnight Sun	Midnattssol	Sweden	1	2016	2016	SVT1	21:00	8	1.384.000	36%
Jordskott	Jordskott	Sweden	1	2015	2015	SVT1	21:00	10	1.283.000	35%
The Heavy Water War	Kampen om tungtvannet	Norway	1	2015	2016	SVT1	21:00	6	1.278.000	34%
Modus	Modus	Sweden	1	2015	2015	TV4	21:00	8	1.041.000	29%
Acquitted	Frikjent	Norway	1	2015	2015	SVT1	21:00	11	940.000	27%
			1	2012	2013	TV4	21:00	10	942.000	26%
Dicte	Dicte	Denmark	2	2014	2014	TV4	21:00	10	708.000	20%
			3	2016	2016	TV4	21:00	10	618.000	18%
			1	2013	2014	TV4	20:00	6	835.000	25%
The Seaside Hotel	Badehotellet	Denmark	2	2015	2015	TV4	21:00	7	667.143	19%
			3	2016	2016	TV4	21:00	7	730.714	21%
			4	2017	2017	TV4	21:00	7	700.000	18%
Blue Eyes	Blå Ögon	Sweden	1	2014	2014	SVT1	21:00	10	765.500	22%
Follow the money	Bedrag	Denmark	1	2016	2016	SVT1	21:00	10	550.000	17%
			1	2012	2012	SVT1	21:00	8	609.000	17%
Lilyhammer	Lilyhammer	Norway	2	2014	2014	SVT1	21:00	8	479.000	13%
The Team	Mord uden grænser	Denmark	1	2015	2015	SVT1	22:00	8	420.000	15%
1864	1864	Denmark	1	2014	2015	TV4	21:00	4	380.000	15%
Norskov	Norskov	Denmark	1	2015	2016	TV4	23:00	10	126.000	14%
Trapped	Ófærð	Iceland	1	2016	2016	SVT1	22:00	10	281.000	14%
The Third Eye	Tredje Øyet	Norway	1	2014	2015	TV4	21:00	10	351.000	14%
Occupied	Okkupert	Norway	1	2015	2016	SVT1	21:30	10	342.000	12%
Tellus	Tellus	Finland	1	2014	2015	SVT2	22:30	6	55.000	4%

Finland

Nordic drama series on Finnish broadcast TV

Unlike the other Nordic countries, the series in the sample span across a variety of Finnish channels – public service, commercial, main, and niche channels.

Remarkably, not a Finnish but a Norwegian title, *Occupied*, takes the lead with a 38% share on MTV3. This is followed by one of the two Finnish series in the sample. With a 31% share, *Bordertown* on YLE1 exceeds *Tellus* (22%) broadcast in the exact same slot on YLE1 two years before.

No pattern of preferred country of origin can be detected in the sample when it comes to Finnish audience preferences for Nordic content – Swedish, Norwegian, Danish, and Icelandic series do equally well (or bad).

The bottom eight series have shares equal to or below 10%, and are all broadcast on niche channels with the exception of *1864* (DK) on YLE1. It only gained a 10% share, which is far below all other Nordic series on the main public service channel YLE1.

English Title	Original Title	Country of prod.	Season	Year of prod.	FI Release	Channel	Start time	Episodes	Rating	Share
Occupied	Okkupert	Norway	1	2015	2016	MTV3	21:00	10	873.530	38%
Bordertown	Sorjonen	Finland	1	2016	2016	YLE1	21:00	11	676.560	31%
Springtide	Springfloden - liget i sandet	Sweden	1	2016	2016	YLE1	22:00	10	454.470	29%
The Bridge	Broen	Denmark/Sweden	1	2011	2013	YLE1	22:00	10	356.235	25%
			2	2013	2013	YLE1	22:00	10	299.763	23%
			3	2015	2015	YLE1	22:00	10	474.905	29%
Dicte	Dicte	Denmark	1	2012	2016	YLE1	21:00	10	354.056	23%
Tellus	Tellus	Finland	1	2014	2014	YLE1	21:00	6	466.025	22%
Acquitted	Frikjent	Norway	1	2015	2015	MTV3	21:00	10	409.975	21%
			2	2016	2016	MTV3	21:00	6	272.407	13%
Modus	Modus	Sweden	1	2015	2016	MTV3	21:00	8	396.248	20%
Trapped	Ófærð	Iceland	1	2016	2016	YLE Fem	22:00	10	153.672	10%
1864	1864	Denmark	1	2014	2015	YLE1	21:00	8	229.183	10%
Follow the money	Bedrag	Denmark	1	2016	2016	YLE Fem	22:00	10	142.484	9%
The Third Eye	Tredje Øyet	Norway	1	2014	2015	Nelonen	21:00	10	215.935	13%
			2	2016	2017	Liv	21:00	10	68.647	4%
Jordskott	Jordskott	Sweden	1	2015	2015	YLE Fem	21:00	10	141.758	8%
			1	2012	2012	YLE Fem	22:00	8	95.047	6%
Lilyhammer	Lilyhammer	Norway	2	2014	2014	YLE Fem	22:00	8	138.372	8%
			3	2015	2015	YLE Fem	22:00	8	110.174	7%
The Heavy Water War	Kampen om tungtvannet	Norway	1	2015	2015	YLE Fem	21:30	6	84.438	5%
The Seaside Hotel	Badehotellet	Denmark	1	2013	2016	YLE Fem	20:00	6	38.451	3%
			2	2015	2016	YLE Fem	20:00	7	80.636	4%

Iceland

Nordic drama series on Icelandic broadcast TV

11 out of 21 series in the sample have been broadcast in Iceland, which is less than the other countries. The series all aired on RÚV. However, they gained comparatively large shares, with the lowest being 44% (1864) and the highest being 87% (Trapped).

The only Icelandic title in the analysis is Trapped, which also tops the chart with 149.000 national viewers. Although the shares for The Team (DE, DK and others) and The Bridge I (SE/DK) come close to that of Trapped, the particular scheduling of the series in late primetime means that in terms of rating, approximately 50.000 Icelanders were watching at the time of broadcast.

None of the Finnish series in the sample were broadcast in Iceland, and there seems to be no pattern in the Icelandic audience preferences for either Danish, Swedish, or Norwegian content.

English Title	Original Title	Country of prod.	Season	Year of prod.	First Release	Channel	Start time	Episodes	Rating	Share
Trapped	Ófærð	Iceland	1	2016	2016	RÚV	21:00	10	146.900	87%
The Team	Mord uden grænser	Denmark	1	2015	2016	RÚV	22:30	8	46.000	77%
The Bridge	Broen	Denmark/Sweden	1	2011	2012	RÚV	22:20	10	55.600	75%
			2	2013	2013	RÚV	21:00	10	66.100	72%
			3	2015	2015	RÚV	21:00	10	62.200	66%
Modus	Modus	Sweden	1	2015	2016	RÚV	21:00	8	46.625	70%
Follow the money	Bedrag	Denmark	1	2016	2016	RÚV	21:30	10	49.500	65%
			2	2016	2016	RÚV	21:30	10	44.200	68%
Dicte	Dicte	Denmark	1	2012	2013	RÚV	21:00	10	58.900	64%
			2	2014	2015	RÚV	21:00	10	52.900	67%
Occupied	Okkupert	Norway	1	2015	2016	RÚV	22:30	10	34.500	66%
Lilyhammer	Lilyhammer	Norway	1	2012	2013	RÚV	21:00	8	42.375	59%
The Heavy Water War	Kampen om tungtvannet	Norway	1	2015	2015	RÚV	21:30	6	28.167	51%
Nobel	Nobel	Norway	1	2017	2017	RÚV	21:10	6	28.667	44%
1864	1864	Denmark	1	2014	2014	RÚV	21:00	8	30.125	44%

Country comparisons

The shares for the individual countries can be summarized to reveal broader trends in the distribution and viewership between those countries. The table (right) shows the average share for the series in the countries they have been distributed in.

The table clearly shows that the majority of domestically produced series reach higher shares in their country of production than non-domestic series do.

The table also shows that the series do remarkably better in some countries than others. In particular, the Icelandic shares are substantially higher (the average share for series from the other countries reaching 64%). The Nordic series also do better in Norway than elsewhere, and the non-domestic productions reach shares that are close to that of Norwegian series when aired in Norway with an average share of 24%.

The opposite is the case for series broadcast in Finland and Denmark, where non-domestic series often fail to reach shares above 10%. The average share for non-domestic series is 12% in Denmark and 13% in Finland. In Sweden, the non-domestic series reach 18%. These shares also reflect issues of main and niche channels, which will be further elaborated in the section discussing interviews with broadcaster officials.

The table suggests that there is no clear relationship between the share a series has in its country of production, and the share it gets in the other countries. Some series (such as *The Bridge* (SE)) clearly does well across all countries, whereas *The Seaside Hotel* (DK) has a share that is at about three times larger in Denmark than in Norway and Sweden and 20 times larger than in Finland. This is interesting, since analyses from 2010 indicated that such a relationship might exist.¹

A comparative analysis of the shares for the seasons ($N = 92$) shown on the main channels in the five countries reveals that there is no significant correlation ($R = 0.09$) between the performance of a series in its home country and

abroad. The calculation was based on normalized shares for domestic and non-domestic screenings. The Danish screening of *The Bridge* was counted as domestic for the purpose of the analysis.

Country and title	Country of broadcast				
	Denmark	Finland	Iceland	Norway	Sweden
	Share (%)				
Denmark • 1864	52	10	44	13	15
Denmark • Dicte	41	23	65	22	21
Denmark • Follow the money	50	9	66	23	17
Denmark • Norskov	31			20	14
Denmark • The Seaside Hotel	61	3		25	21
Denmark • The Team	46		77	26	15
Finland • Bordertown		31			
Finland • Tellus		22			4
Iceland • Trapped	12	10	87	28	14
Norway • Acquitted	24	17		36	27
Norway • Lilyhammer	44	7	59		15
Norway • Nobel	40		44		
Norway • Occupied	7	15	66	35	12
Norway • The Heavy Water War	23	5	51	64	34
Norway • The Third Eye	4	8		22	14
Sweden • Blue Eyes	4			17	22
Sweden • Jordskott		8		15	35
Sweden • Midnight Sun					36
Sweden • Modus	12	20	70	23	29
Sweden • Springtide	9	29		37	38
Sweden • The Bridge	36	25	71	35	32

Empty cells indicate that that series has not been broadcast in the country

¹ *Nordic drama series: The facts*. Report prepared for Nordvision by DR Medieforskning/Niels Marslev. April 2010

The most popular series reach large shares of the audience, and are watched by many thousands of Nordic viewers.

The table (right) shows the total ratings for the 10 most popular seasons of the 21 series from the period analyzed, and how many of the five countries they have been broadcast in.

Six of the most viewed seasons stem from the same two series, *The Bridge* and *The Seaside Hotel*. Overall, the three seasons of *The Bridge* has clearly performed best, with the seasons consistently reaching combined, average ratings between 2,7 and 3,6 million viewers.

The list shows the strong ratings success of *The Heavy Water War*, which has achieved ratings similar to *The Bridge*.

The list also reflects the strong position that Danish series have achieved during the period under analysis, which broadly coincides with the global success of several Danish television drama series. Five of the ten most popular seasons have Denmark as their country of production (*The Seaside Hotel*, *Dicte* and *Follow the Money*). The strong Danish element in the Swedish production *The Bridge* further underlines this tendency. This

is in line with findings from 2010 on the comparative strength of Danish series.²

The remaining series are produced in Sweden (*Springtide*) and Norway (*The Heavy Water War*).

Title (season)	bined avg. TV rating Thousands	Countries
The Bridge (III)	3598	5
The Bridge (II)	3260	5
The Heavy Water War	3064	4
Dicte	2963	5
The Seaside Hotel	2812	4
The Bridge	2704	5
The Seaside Hotel (III)	2634	3
Springtide	2527	4
The Seaside Hotel (II)	2490	4
Follow The Money	2451	5

² *Nordic drama series: The facts*. Report prepared for Nordvision by DR Medieforskning/Niels Marslev. April 2010

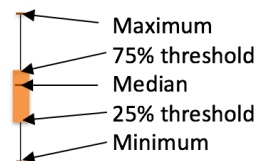
The differences between the countries is not a direct reflection of audience preferences, it also depends on differences between the market structures in the five countries. The figure (right) shows that scheduling choices – here reflected as the choice between niche and main channels – has a strong influence on the viewing patterns.

The figure shows a clear difference in shares reached by series shown on niche channels, with Liv and YLE Fem in Finland reaching shares at the approximately same level as DR2 and TV2 Charlie in Denmark.

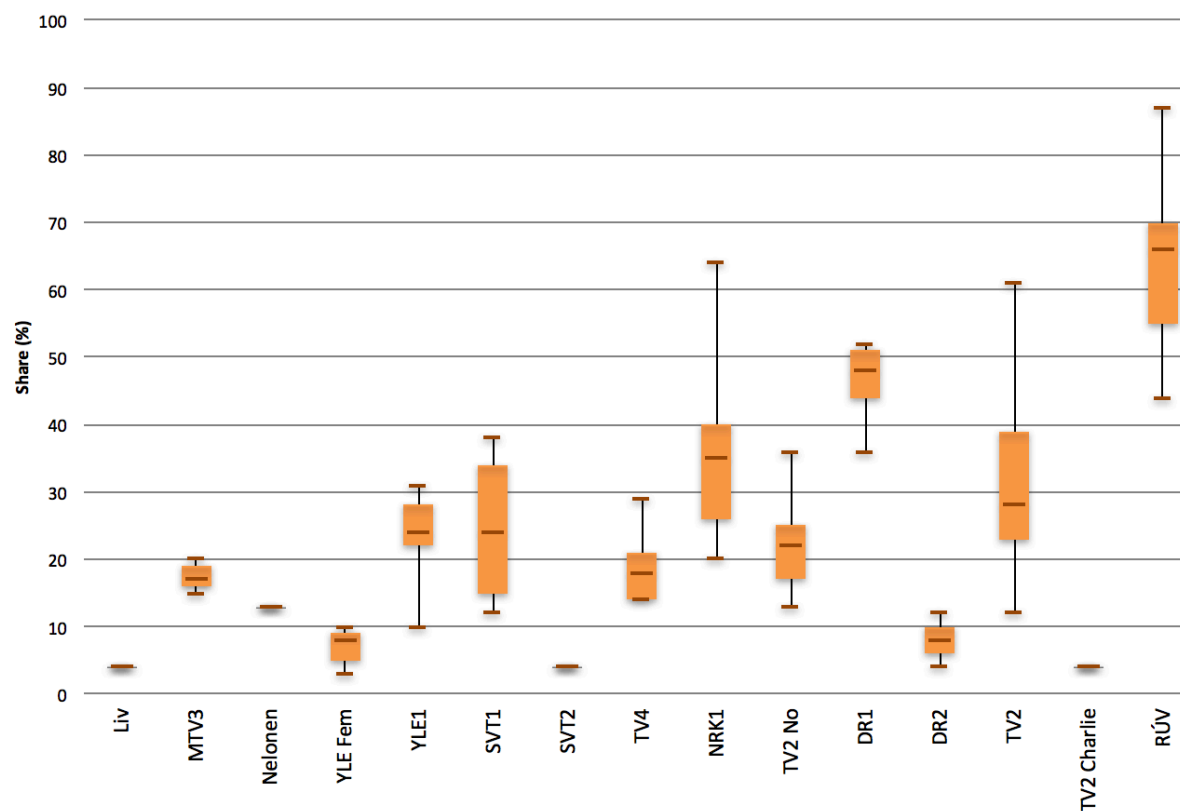
However, the figure also reveals that important differences exist even on the main channels. DR1 and TV2 in Denmark reach remarkably higher shares than SVT1 and NRK1 for example, and RÚV in Iceland reach even larger shares.

The observation of the preferences for nationally produced content should therefore also take scheduling choices into account. Viewer shares depend heavily on scheduling choices, which the national differences also reflect – this point will be further developed in the following sections.

Legend



Distribution of average share per channel



To investigate the impact of main versus niche channel, the table (below) shows that the combined effect of factors such as channel choices and origin of the series vary between the countries.

One example from the table is that domestic series shown on the main channel in Norway get a share that is ten percentage points higher than the overall average share (25%) across all seasons in all countries. get a share that is ten percentage points higher than the average share (25%) across all series broadcast in Norway. Or that foreign (non-Finnish) series placed on a Finnish niche channels get a share 14 percentage point lower than average.

There is no main channel effect for domestic series in Sweden and Finland, and foreign series get lower shares in Sweden, Finland and Denmark overall, whereas there is no significant effect from foreign series in Norway.

In Iceland, foreign series are hugely popular (38 percentage points above the general average). This indicates that Icelandic viewers are the most dedicated fans of Nordic series compared to the remaining countries as also reflected in the analysis above. Note that there were no screenings on niche channels in Iceland. The numbers reflect the difference between viewer preferences for domestic and foreign content in Iceland compared to the other countries.

The effects correspond with key observations from the interview analysis documented in the section Reflections on Nordic Television Drama, which uncovers substantial differences between the strategies for scheduling and marketing considerations between the different channels.

The analysis was conducted as an OLS regression analysis.

	Domestic	Foreign
Main channel	Denmark (+24%) Iceland (+62%) Norway (+10%)	Iceland (+38%) Sweden (-8%)
Niche channel		Finland (-14%) Denmark (-18%)

Values in parenthesis show the difference from the overall average share of 25% that follows from the scheduling and content origin.

Streaming Nordic drama

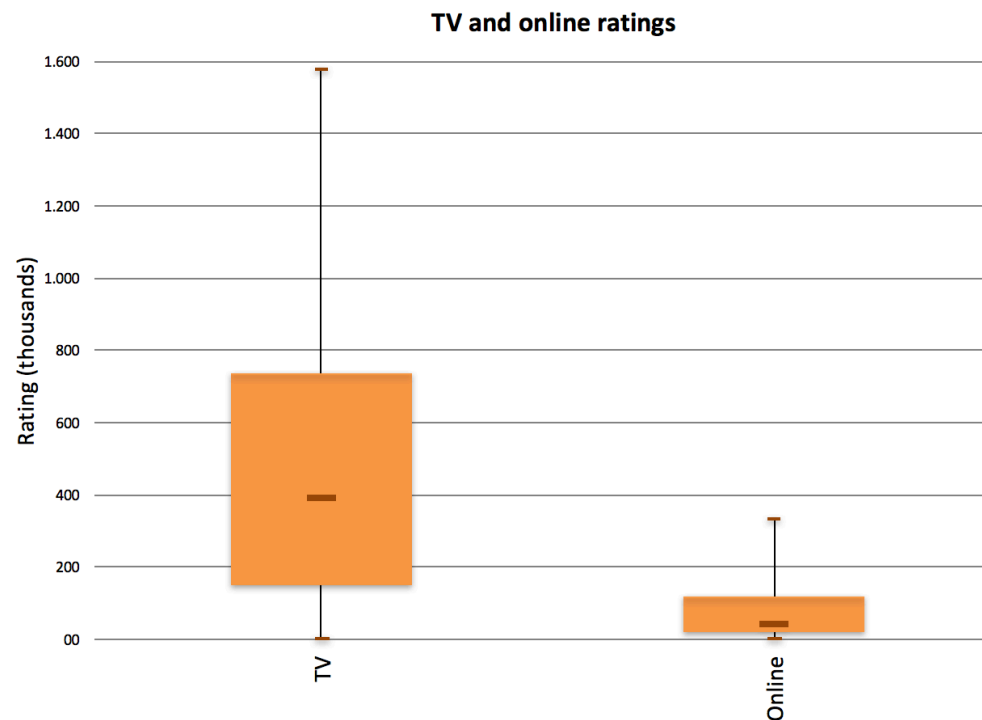
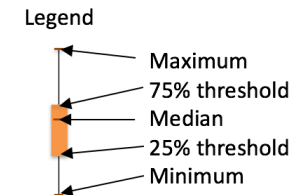


Digital broadcasting and on-demand viewing

The advent of streaming channels such as Netflix and HBO Nordic in the Nordic countries are driving viewing habits towards an increasing use of online viewing. Traditional television broadcasters are moving to embrace this change in viewer behavior, and are increasing their offering of streaming content. In the case of TV series, the opportunities for broadcasters to offer online distribution depends on the negotiation of rights for this form of distribution. Series episodes are often distributed for catch-up viewing, and made available in windows of days or weeks in connection with the television broadcast of individual episodes.

A key interest in relation to online distribution relates to the scope of use. While no established, standardized method exists for measuring online audiences, the broadcasters included in the analysis have collected online ratings for a number of series. The results show that the online audiences are sizeable, but also remain much smaller than television audiences. The figure (right) shows that online ratings range between 2 and 332,000 viewers, while television ratings grow to more than 1.58 million on some occasions.

The measurements do not distinguish between separate and overlapping audiences, so online audiences likely include viewers that only watch a given series online, and viewers that view a series both online and on TV.



Online viewing is not distributed evenly across series, and the table (below) shows that there are large differences in the online ratings of series. The table shows that season three of the Swedish series *The Bridge* and season one of Danish *Follow the money* have more than 440.000 online viewers. Similar to these two seasons, the Swedish *Springtide* also has online data for four of the five countries, but has reached about 100.000 fewer viewers.

It is notable that there is a greater variety in terms of how many series have reached the top list, compared to the TV ratings list.

However, the table does give a broad indication of the scale of online viewing for the top 10 seasons.

It is important to note that online viewing follows the pattern of TV viewing also with respect to the viewing figures for domestic and foreign productions. *Midnight Sun* and *Nobel* achieved their high online ratings noted in the table from viewing in their home countries alone. The online ratings for the remaining series in the list were achieved with online audiences both at home and abroad. It is also important to note that data for online viewing

were only available for about half of the seasons shown. Conclusions based on the table should therefore be made with caution.

It should be noted that the use of ratings rather than share (which is not obtainable for online viewing) means that the size of the population of the country of distribution impacts the numbers in a dramatic way: If a series has been distributed online in Sweden (which has nearly twice as many inhabitants as Denmark, Norway and Finland, respectively, and 29 times as many as Iceland) it is likely to get substantially larger online ratings.

Title (season)	bined avg. online rating	Countries
	Thousands	
The Bridge (III)	442	4
Follow the Money	440	4
Springtide	337	4
Nobel	332	1
Trapped	293	3
Follow the Money (II)	281	2
The Heavy Water War	269	2
The Team	220	3
Midnight Sun	214	1
Jordskott	192	2

The analysis of online and TV ratings shows that there is a clear connection between viewing activity on TV and online. The figure (below) shows that there is a reasonably strong linear correlation between online and TV ratings for the series where both measures have been obtained. This means that series which are popular with viewers on TV are also popular online.

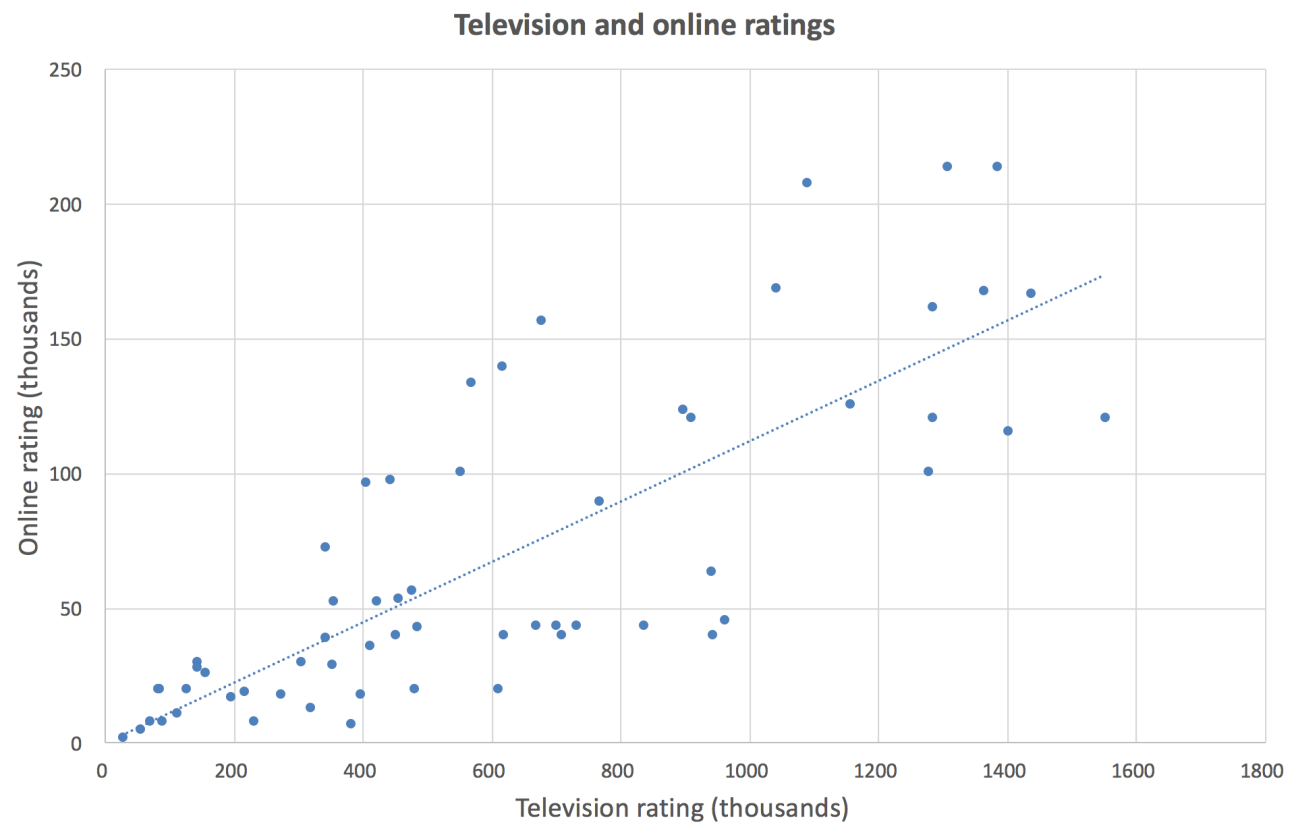
The linear relationship suggests that the magnitude of online ratings is approximately 11% of the magnitude of television ratings. Since this includes both repeated viewing and unique online viewers, it is not possible to draw conclusions about wider changes to overall viewing patterns. Yet *if* all online viewing was unique (an unlikely assumption), then online viewing would account for 10,1% of the total audience. However, since the online ratings most likely comprise a mix of unique online viewing and duplicate viewing on both online and TV, it is more correct to conclude that the *maximum* proportion of online viewing amounts to 10,1%, but that the actual number must be lower.

The data do not reveal any substantial differences over time with respect to the link between online and TV rating, which suggests that the drivers for

online viewing are the same as for television viewing (popularity and overall series appeal etc.)

The number of series for which online ratings are available increase sharply over the analysis period, which to some extent reflects that more series have been distributed.

The analysis is fairly robust as the linear analysis has an R^2 value of 0.63. Two outliers have been removed for model stability. Evaluation and use of the result must take into account that the online ratings data are collected under different circumstances using different / unconsolidated methods. The results can therefore *only* be taken as indicative.



Target groups – differences and similarities

Who are the audiences for Nordic TV drama? This is the question that the present section sets out to answer. Once they travel across national borders, different series appeal to different audiences in different countries. To answer the question of who the audience then is, the report first looks at the average target group shares of all series broadcast in the five countries respectively, and then at four different cases in the sample. These four series have in common that they all travelled to all five countries, and that they, by all comparisons, performed well.

TABLE: AVERAGE SHARE OF TARGET GROUPS*

DENMARK		NORWAY, NRK		NORWAY, TV2		SWEDEN		ICELAND		FINLAND	
	Share %		Share %		Share %		Share %		Share %		Share %
All	33	All	31	All	24	All	23	All	66	All	15
Women	34	Women	31	Women	26	Women	24	Women	67	Women	17
Men	31	Men	31	Men	21	Men	21	Men	65	Men	13
18-34	23	20-29	14	18-34	16	20-34	15	18-34	50	18-34	6
35-54	32	30-39	19	35-54	28	35-54	21	35-54	63	35-54	14
55+	37	40-49	25	55+	23	55+	26	55+	78	55+	20
No education	28	50-65	37	No education	23	No education	22			No education	10
Youth education	25	65+	42	Vocational school	25	Education < 12 year	22			Vocational school	13
Vocational school	33	Vocational school	28	Short education	22	Education > 12 year	23			Short education	19
Short education	36	Short education	36	Long education	20					Medium education	18
Medium education	37	Long education	45							Long education	23
Long education	38										
Number of titles	15	Number of titles	7	Number of titles	9	Number of titles	19	Number of titles	12	Number of titles	16

The table below gives an overview of the audiences for Nordic drama in the respective countries. Some general tendencies can be traced from the data. First, women seem to view more Nordic drama than men, with the only exception being NRK in Norway. Secondly, there is a tendency that the viewing of Nordic drama increases with age, except for on TV2 in Norway. It must be kept in mind, however, that the data do not include streaming.

Lastly, when it comes to educational levels, in Denmark, Norway (NRK), and Finland audiences are generally well-educated, whereas the

audiences watching TV2 Norway display the opposite tendency, and in Sweden there are no overall educational variation.

Relative to the individual countries as well as the four case series, it is important to note that the audience profiles also reflect the channel audience profiles in each country. That is, the target audiences have to be seen against the backdrop of who the viewers of the respective broadcast channels usually are.

* Norwegian target audiences are split by NRK and TV2, since the ratings data did not allow for customization of age ranges.

Moving away from looking at overall averages for countries and instead focusing on the four specific case series, it is interesting to see how the appeal of a series can vary across the Nordic countries.

For instance, the Swedish series Modus had a varied and broad audience in Sweden, with an overweight of women, and a tendency to attract people with no education or in education category 1. This is similar in Norway, but in Finland and Denmark, there is strong tendency for older age groups and also audiences in education category 2.

Modus, Share %					
	DK	NO	SE	FI	IS
All	12	23	29	20	70
Women	13	25	33	24	71
Men	12	22	25	16	70
18-34	6	14	26	12	50
35-54	9	27	30	25	69
55+	19	23	30	20	79
No education	12	23	32	11	-
Education 1*	9	25	30	19	-
Education 2*	14	20	27	26	-

*Education 1: Vocational, youth education, or less than 12 y.

*Education 2: Short, medium, long university education or more than 12 y.

Another example is the Danish series The Seaside Hotel. Here there is a strong pattern across all five Nordic countries when it comes to gender and age. The women's share of viewing is significantly larger than the men's and the share of viewers increases with age.

However, when it comes to educational backgrounds, we see no significant differences in the Danish or Swedish audiences, whereas Norway and Finland stand out in distinct ways. In Norway, audiences in education category 1 have the highest share, whereas in Finland it is audiences in category 2 (Note the relative low shares in Finland – this may result in uncertain numbers).

The Seaside Hotel, Share %					
	DK	NO	SE	FI	
All	60	25	21	3	
Women	63	28	24	4	
Men	57	22	17	2	
18-34	45	12	9	0	
35-54	59	25	14	2	
55+	67	29	27	5	
No education	59	23	21	0	
Education 1*	59	27	22	3	
Education 2*	58	23	19	8	

*Education 1: Vocational, youth education, or less than 12 y.

*Education 2: Short, medium, long university education or more than 12 y.

The Icelandic series Trapped has extremely high shares in all national target groups. While there is only a weak tendency for an older audience in the home country, this tendency is extremely strong in the four remaining Nordic countries, where an older audience seems to be the primary viewers.

There does not seem to be gender gap, but of all the cases in the sample, Trapped has the largest differences between educational categories. It is mainly audiences with a university degree (education 2) – in Sweden also education 1 – who watch the series. One reason is probably the unfamiliar language.

Trapped, Share %					
	DK	NO	SE	FI	IS
All	12	28	14	10	87
Women	13	28	15	11	87
Men	12	28	12	9	88
18-34	5	9*	6	2	84
35-54	6	26*	11	8	87
55+	18	40*	17	14	89
No education	7	-	9	3	-
Education 1*	9	25	14	8	-
Education 2*	18	36	14	14	-

*Education 1: Vocational, youth education, or less than 12 y.

*Education 2: Short, medium, long university education or more than 12 y.

*NO age groups (NRK): 20-39, 40-64, and 65+

The last case is the Norwegian series *The Heavy Water War*. This is the only series out of the four, where men have a higher share than women. This goes against both the viewing pattern of Nordic series and the overall pattern in most of the countries where women in general watch more TV drama.

The age groups also seem to follow the same pattern across countries – the older group, the higher shares. A similar trend was observed in research carried out in 2010.³ However, when it comes to education, there is no general tendency to point at. In Denmark, the group with the highest share is education 1, in Norway and Finland it is education 2, whereas in Sweden it is the group with no education.

How Nordic drama attracts different audiences across the Nordic countries is a complex question, which, to fully answer, needs to be addressed not only by looking at audience shares. Several factors come into play, such as institutional decisions about scheduling, promotion, and online viewing options. But also cultural habits, preferences, and expectations play a vital role in influencing what kind of audiences enjoy and prefer certain types of content.

³ *Nordic drama series: The facts*. Report prepared for Nordvision by DR Medieforskning/Niels Marslev. April 2010

This section, then, pointed to some overall patterns and offered a more detailed look at specific cases to show the diversity and shifting of audiences across gender, age and education in the Nordic countries. A qualitative study could shed a more nuanced light on the different kinds of cultural encounters happening when Nordic series meet their neighboring audiences across the Nordic countries. However, in overall terms, the 21 series attract a broad and varied audience.

The Heavy Water War, Share %					
	DK	NO	SE	FI	IS
All	23	64	34	5	51
Women	21	61	31	3	50
Men	25	66	37	6	53
18-34	12	51*	21	1	33
35-54	22	63*	31	3	48
55+	28	74*	39	7	64
No education	16	-	43	0	-
Education 1*	25	61	32	4	-
Education 2*	23	73	37	8	-

*Education 1: Vocational, youth education, or less than 12 y.

*Education 2: Short, medium, long university education or more than 12 y.

*NO age groups (NRK): 20-39, 40-64, and 65+

A photograph of a man with a beard and dark hair, wearing a dark jacket, talking on a mobile phone. He is in a crowded, brightly lit hallway with blue structural elements. Other people are visible in the background, some wearing winter clothing. The overall atmosphere is busy and somewhat somber.

Reflections on Nordic drama

Nordic drama acquisitioning and scheduling strategies

Interviews with acquisitions executives and schedulers at Nordic broadcasters

NORDIC DRAMA TIMESLOTS

The broadcasters in all five countries have worked strategically with planning and designating specific TV slots for respectively national and foreign TV drama. Interestingly, it seems that Nordic drama can and do fit into both national and foreign time slots. Indeed, a noteworthy and general tendency across all five countries is that Nordic series are now prioritized by being scheduled (to a large extent) on main channels in primetime. That is, whereas the question in a report from 2010 was *whether Nordic fiction deserved large-channel audiences, or if it was better exploited to strengthen smaller channels*⁴, the answer in 2017 is *yes* – it has proven to deserve and attract large-channel audiences.

This prioritization of ‘making room’ for Nordic content has also paved the way for an overall increase in the distribution of Nordic titles in the region. As such, while one conclusion of the just mentioned 2010-report, was that for instance

⁴ *Nordic drama series: The facts*. Report prepared for Nordvision by DR Medieforskning/Niels Marslev. April 2010

Norwegian TV drama rarely travelled to more than two countries outside Norway, the picture now is quite the opposite: the Norwegian series travel widely. This tendency was also noted by several non-Norwegian acquisition executives.

In **Denmark**, DR1 reserves Sunday primetime for national drama, while for TV 2 it is Monday primetime. The Heads of Acquisitions at both DR and TV 2 explain how, in lack of Danish content, Nordic drama also figures in the legacy drama slots. One example is the highly successful *The Heavy Water War* (NO) on TV 2. The niche public service channel DR2 works with a designated foreign TV drama slot on Wednesdays at eight o’clock, where DR experiments with genres other than the “safe choices”, referring to British and Swedish crime dramas. For instance, this is where the first Icelandic series *Trapped* (IS) had its chance and found an impressive audience.

Rather than splitting designated drama slots between them, **Norwegian** TV2 and NRK both broadcast national and Nordic content in primetime on Sunday and Monday. Program Acquisitions at NRK and Head of International Programs at TV2 both outline a priority hierarchy,

where the two evening schedules are first and foremost reserved for national content, then Nordic, and lastly international.

In **Sweden**, SVT1 primarily places national and Nordic TV drama in primetime on Sunday, but we also find Nordic titles on Monday through Thursday in primetime. Head of Acquisitions explains that Nordic content is generally prioritized. Accordingly, it is normally broadcast on the main channels, yet the one Finnish title, *Tellus* (FI), aired on SVT2. On the legacy commercial channel TV4, drama is scheduled throughout the weekdays Monday to Thursday in primetime.

Only the public service channel in **Iceland**, RÚV, broadcast Nordic series from the sample. The common denominator for the Nordic series is the Monday, or rarely Sunday, primetime slot. Exceptions are, however, *The Bridge* (SE/DK), *The Team* (DK), and *Occupied* (NO), which were broadcast on Tuesday in late primetime.

In **Finland**, Sunday primetime on YLE1 features national TV drama first, and Nordic titles second. Corresponding to YLE’s channel profiles, mainly the Swedish language channel airs Nordic TV

series (always with the option of subtitles in Finnish). YLE Fem in particular prioritizes Nordic content, and many series from the sample were broadcast on YLE Fem throughout the seven weekdays and always in primetime.

The advantage of working with these designated Nordic drama timeslots is that the broadcasters are able to build up audience expectations and to deliver on them. In other words, the flow television audience come to expect certain contents from these particular slots, and the broadcasters in turn make sure to acquire the specific Nordic titles that fulfill audience expectations. One interviewee called this a “contract” with the audience, while another referred to it as educating audiences with regards to when and where to turn on their TVs.

SCHEDULING & PROMOTION

When evaluating the performance of series based on their audience ratings and shares, several factors must be taken into account – one is the scheduling, another is content, and a third is promotion such as trailers and spots on web, radio, and TV and print advertisements.

Across countries, Nordic series are generally seen as quality content and are often scheduled where broadcasters think they will obtain the greatest audience. Besides placing series in specific drama timeslots, schedulers also consider lead-in from other programs aired right before the series. One

example is from TV 2 Denmark: *Acquitted* (NO) was scheduled at half past ten right after the audience darling *Strictly Come Dancing* where it enjoyed a huge lead-in from the show. As such, what might seem like a late primetime slot was a strategic prioritization of Nordic drama.

In addition to lead-in, promotion of the series is also of great importance. Obviously not all content can get the same amount of promotion, and so, strategic choices govern which series are promoted and which are not.

The head of Acquisitions at SVT explains this strategy, which might be referred to as “the big get bigger”. That is, the series with expected high audience ratings not only get the primetime slots on the main channels, they are also assigned the entire promotional packages – rather than promoting niche and gamble acquisitions.

For instance, when the Finnish Tellus was broadcast on SVT2 at half past ten on a Wednesday evening with no promotion, it ended up fulfilling the prophecy: Finnish drama is not going to work on Swedish TV (SVT).

To sum up, inevitably scheduling and promotion is configured by prioritization of some series over others. Hence, there are two strategies at play: either the broadcasters take chances with new

and niche content by favoring it in regards to scheduling and promotion, or they bet on the safe choices, which they then give priority to. From the interviews, it seems that the latter strategy is also the most common – although examples of the former do occur, as with for instance *Trapped*.

NORDIC LANGUAGES & GENRES

When discussing Nordic series with Nordic broadcasters, inevitably language similarities, and sometimes barriers, come up. Following the 21 series in the sample across the five countries, the airings and ratings to an extent speak for themselves: the language similarity between Danish, Norwegian, and Swedish series enables them to succeed across the three countries. Within this group, however, the Swedes prefer Norwegian content, the Norwegians prefer the Danish content, and the Danes prefer Swedish television drama.

The Finnish and Icelandic languages are often seen as barriers to distribution in the other countries, since they are not easily understood by audiences outside their national territories. Titles from the two countries are a rare sight outside their homelands, which is also reflected in the data sample that only contains two Finnish and one Icelandic series.

Despite this general pattern, *Trapped* (IS) was highlighted by interviewees as a curious case of

taking a chance that ended up paying off in spite of the Icelandic language. As one head of acquisitions puts it, the storyline overcame the immediate obstacles. At YLE, the success of *Trapped* has also led to more Icelandic productions being acquired, which might point to *Trapped* having paved the way for a general momentum for Icelandic content.

Being a crime series, *Trapped* joins the recent Nordic Noir wave by way of depicting characters, landscapes and mood. The Nordic Noir genre in turn joins an overall crime genre led by British content, which has for years now worked well on Nordic TV screens.

Some crime, however, cannot succeed by being part of the genre in its own right. One example is *Follow the Money* (DK), which immediately comes across as a typical Nordic Noir crime drama, yet turns out to be somewhat more complicated (financial crime) than a *whodunit* detective story. As such, in Sweden, for instance, the series did not become the audience success as had otherwise been expected.

This also points to another aspect of storytelling genres and accessibility. The Director of Acquisitions at TV2/Norway explains how question of whether a series is either episodic (each episode has a closed story and can be viewed separately) or serialized (the story stretches over episodes that need to be viewed in the right order) impacts on the series' ability to attract audiences. Episodic series are easier to

opt in and out of, and thus easier to schedule and re-schedule.

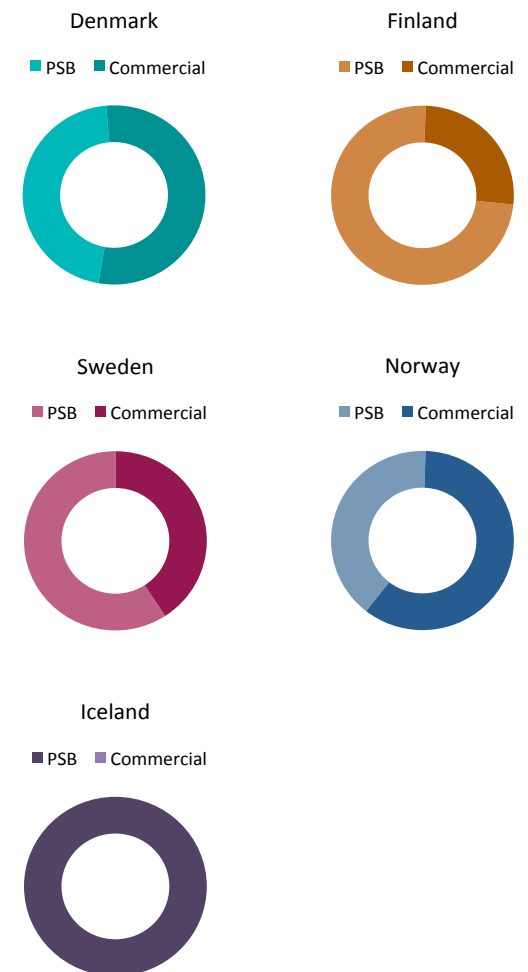
Lastly, while one of the conclusions in the above-mentioned report from 2010 was that family series travel exceptionally well, the present data suggest that the tendency to travel well extends beyond family drama. The 21 series under analysis are crime, political or historical dramas, but none are family series. Even if the 21 series present themes related to the family (for instance the problematic work/life balance of prominent politicians or justice-craving detectives), none of them can be described as family series. Yet they have travelled quite well, suggesting that the market for Nordic series has grown more varied.

All in all, languages do matter but so do issues related to genres and storylines or casting and stylistic choices; all of which are topics that could be interesting to explore further in a different context.

PUBLIC SERVICE & COMMERCIAL

Several interviewees from public service broadcasters connect the airing of Nordic drama to their respective public service obligations. Hence, broadcast of Nordic as opposed to for instance American drama is part of the obligation to the public.

As a public service broadcaster, we need to have something different from what you find in the commercial media landscape. And that [kind of different] we often get from Sweden or England (DR).



Although public service broadcasters connect the broadcasting of Nordic content and public service obligations, 45 in 114 airings of seasons from the 21 series happen on commercial channels (see graph above) – which are not in the same way obliged to prioritize Nordic content.

As such, broadcasting Nordic series is rather an economically viable business strategy – for commercial and public service broadcasters alike. The difference, then, lies in the extent to which a broadcaster reaches certain audience ratings in order to justify the acquisition and following scheduling of the series in question. In the data, several examples emphasize how particularly, but not exclusively, commercial broadcasters re-schedule Nordic series in the midst of a season, if the series does not live up to the expected ratings. For instance, *The Third Eye* on the niche channel TV2 Charlie in Denmark was first rescheduled to midnight and later to three o'clock in the morning. In contrast, assessments of quality on the part of public service broadcasters do sometimes overrule ratings that reflect an immediate failure to attract audiences.

Blue Eyes (SE) was a great series! In spite of declining ratings, we kept it running in primetime, since, as a channel, we've also made a contract with the viewers that do watch it (DR).

One influential arrangement that came up recurrently in interviews with public service broadcasters, was the Nordvision cooperation.

A PUBLIC SERVICE PARTNERSHIP

In terms of the impact of certain public service obligations, the Nordvision cooperation was continuously brought up in interviews by the public service broadcasters. Nordvision is a well-established partnership between the Nordic broadcasters DR, YLE, RÚV, NRK, and SVT set in place to strengthen public service media in the Nordic region. Since the partners cooperate via co-productions, program exchange, co-development of formats as well as knowledge exchange there are many established arrangements and collaborations besides the independent acquisition of individual programs. Several of the titles in the sample are examples of series that were “earmarked” for distribution between the five broadcasters listed because of deals made already during their development and financing. Several titles thus travel between the Nordic public service broadcasters more or less automatically because of the Nordvision cooperation rather than being specifically bought for particular channels or timeslots. As such, Nordvision is an important factor in the distribution of certain series in particular and for distribution patterns in general.

STREAMING AS A NEW STRATEGY

One last reflection on the scheduling and viewing of Nordic drama concerns streaming. Most Nordic broadcasters also have an online streaming option as a supplement or even an independent platform to the linear TV channels.

For instance, Director of Acquisitions at TV2 Norway explained how the online platform TV2 Sumo is not only important as a supplement to the linear viewing of TV series; some series are only available through TV2 Sumo. Moreover, the acquisitions executive at YLE emphasized how a majority of the Nordic series are also notable online successes on YLE's digital platform YLE Arena – that is, irrespective of primetime, lead-in and so forth.

As such, the online distribution of Nordic series has come to play an important role in the overall performance of a series. Moreover, the flexibility of online platforms allows broadcasters to release whole seasons at once, make episode previews, as well as providing already released series a “second window”.

For instance, after the success of *Trapped* in Finland, YLE decided to release the whole season of another Icelandic series, *Case* (2015) on the online YLE Arena, while the series was simultaneously broadcast, one episode each week, on YLE Fem.

Soon, we have a situation where online viewing is the norm and linear viewing is a supplement. Now, when we take into account all platforms, we get a really great result (YLE).

Head of acquisitions at SVT points to a dilemma related to the flexibility of online viewing, which regards the Nordic broadcasters' potential to be a second window for series already distributed through an established streaming service.

On the one hand, we could turn it [a series from an established streaming service] down because we need to protect our market position and identity, but on the other hand, it also seems irrational to turn down a series that could potentially reach millions of viewers on SVT just because 3-400.000 subscribers to [the streaming service] already had the chance to see the series there. It's a dilemma about keeping and enforcing the respect of the public but at the same time stay in the business (SVT).

The online era with new and international SVOD services not only creates new types of scheduling and viewing strategies, but also new production strategies.

From our sample, *Lilyhammer* is a unique example of a co-production between a Nordic

broadcaster, NRK, and a global SVOD service, Netflix. However, such collaborations are an evident trend. TV 2/Denmark co-produced the third season of *Rita* with Netflix and there are currently several other examples of new co-production set-ups between public service broadcasters and SVOD players just as the international streaming services are initiating series on their own. Streaming thus not only changes the patterns of distribution and consumption, but the Nordic television landscape as a whole, and the larger effects of this remains to be seen.

A YOUNGER AUDIENCE

One last perspective on the influence of streaming has to do with the audience profiles. As we saw in the section on target groups in broadcast television, it is often an older audience with an overweight of women and – especially true for public service channels – audiences with a university education. Several of the interviewees pointed to the fact that options for viewing series online attract the younger audiences that linear TV is struggling to capture.

In Finland, YLE Arena has now become the largest streaming platform, offering a vast share of Nordic content. The recent success of the Norwegian web series *SKAM* (2015-2017) has paved the way for more Nordic content targeting youth audiences. As such, YLE Arena now

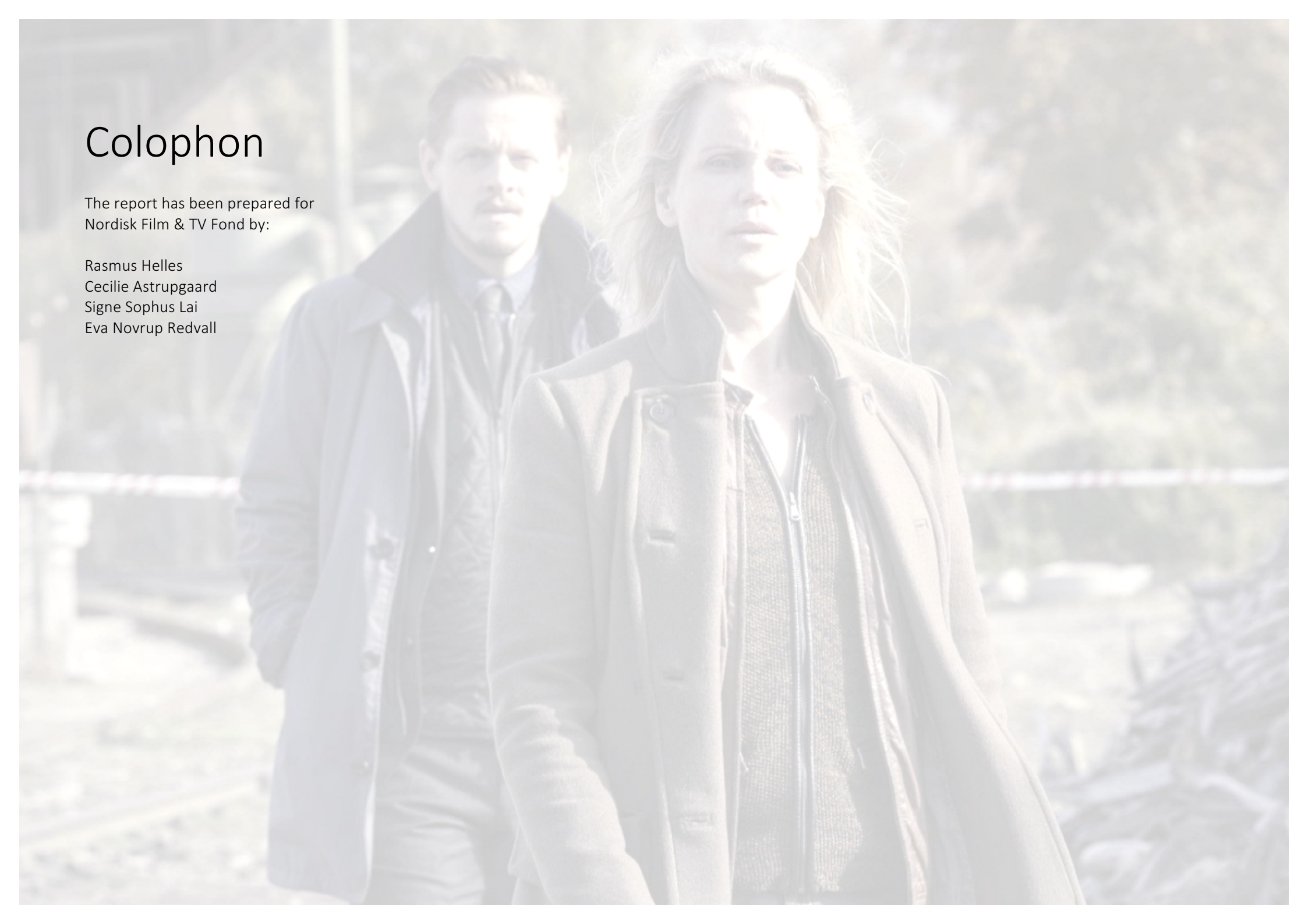
features other Nordic youth series that have not been broadcast on linear TV.

In Denmark, the youth/kids channel DR Ultra is set to shut down their linear channel entirely by 2020 and will continue exclusively as an online channel.

To sum up, the digital viewing platforms of the different broadcasters have the potential of reaching a younger audience, who has so far been less likely to watch Nordic series on linear television.

As illustrated in the points raised in the above, there are many issues related to the distribution and viewing of Nordic series that need contextualization beyond the audience ratings of specific series and general distribution and viewing patterns. We would like to thank all interviewees for their accounts of topics to take into consideration when wanting to gain a nuanced understanding of how television series supported by Nordisk Film & TV Fond meet their audiences in the Nordic countries.

Colophon



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