SUMMARY AND DISCOURSE 2021

CONTENTS

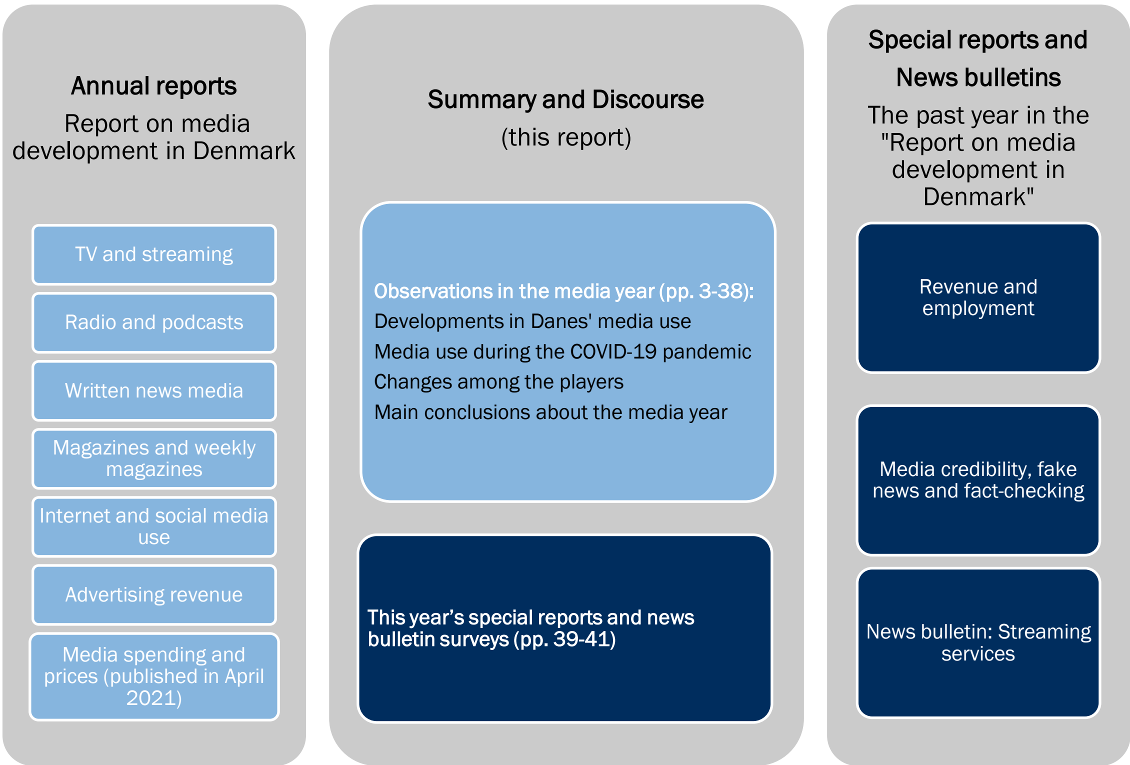
1 INTRODUCTION

This is the eighth edition of the 'Report on media development in Denmark' (Rapportering om mediernes udvikling i Danmark), the first of which was published in 2014.

The media development report for 2021 was prepared in consultation with an external editorial panel set up specifically for the 'Report on media development in Denmark'. The editorial panel consists of eight media professionals – experts, researchers and industry representatives – who have provided advice and suggestions regarding development and prioritisation as well as quality assurance throughout.

'Summary and Discourse 2021' is intended to highlight and discuss the most important conclusions in this year's surveys from not only regular analyses of media usage in Denmark, but also special reports published in the past year. The majority of this year's reports refer to 2020, a year strongly impacted by the COVID-19 pandemic – also in the media industry. Therefore, part of this year's Summary and Discourse is dedicated to describing the effects of the pandemic on media use. In addition, the reports describe several significant changes among the players as these are of significance to the media supply that is available to the Danes.

The structure of the "Report on media development in Denmark" is illustrated in the model below:



For details, read about media developments in the chapters about the individual platforms.

- TV and streaming
- Radio and podcasting
- Written news media
- Magazines and weekly magazines
- Internet and social media use
- Advertising revenue
- Media spending and prices

2 DEVELOPMENTS IN DANES' MEDIA CONSUMPTION

Every report in this year's 'Report on media development in Denmark' clearly indicates that the Danes' media consumption remains in flux. There is a general tendency to watch less linear TV and radio, and consistently fewer people read the media houses' printed publications. On the other hand, increasingly more people stream content, listen to podcasts, read news on the internet and use social media.

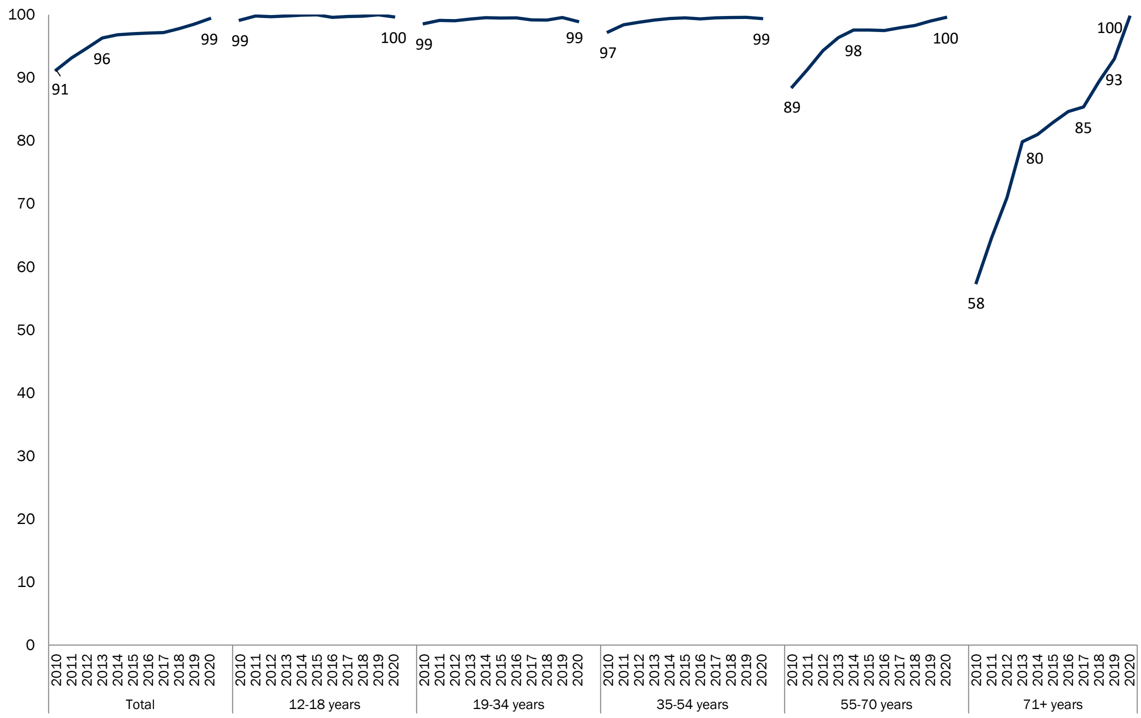
2.1 Preconditions for digital media consumption

One important precondition for these developments is the availability of the internet that functions essentially as the infrastructure that makes digital media consumption possible. Developments in Danes' media consumption should therefore be seen in the light of a generally very high internet availability in Denmark.

Figure 1 below shows that 99 % of the population aged 12+ has access to the internet at home in 2020*). People of all ages have widespread access as between 99 % and 100 % of all age groups has access to the internet at home in 2020. By way of comparison, according to Eurostat, 91 % of the population in the 27 EU Member States has access to the internet in 2020.

While the younger age groups' high share of people who have access to the internet at home has remained relatively stable for a number of years, the oldest groups in particular have lagged behind. However, since 2010 there has been a significant increase in the number of people in the 71+ age group who have access to the internet at home. See Figure 1 under*).

Figure 1: Percentage share of the Danish population (aged 12+) who have internet access at home*. 2010-2020. (by age).



Source: Index Danmark/Gallup - Annual data 2010-2020
Data processed by the Ministry of Culture Denmark

Universe: The Danish population aged 12+

*) The figures for access to and use of the internet in 2020 originate from Index Danmark/Gallup. Kantar Gallup assesses that the figures are slightly exaggerated. This is due to the application of a new data retrieval method. Since 1 July 2019 the data is based solely on the internet. Kantar Gallup assesses that about 97 % has access to the internet. Read more about the method revision here: Methodology.

Technological developments are also a contributory factor to changes in media consumption. Among other developments, increasingly more electronic devices can be connected to the internet. In the past, to access the internet people had to have a desktop computer and a modem. Today, you can connect everything from your TV and phone to watches and even washing machines to the internet. These developments also mean that it is possible to access more different types of media on the same device. As an example, a smartphone can provide access to TV content, linear radio or podcasts, social media and news.

Developments are also evident in the number of electronic devices Danes use at home:

- In 2020, 90 % of Danish households have a smartphone, which is 57 percentage points more than in 2011, when 33 % of households owned a smartphone.
- In 2020, 88 % of Danish households have a laptop computer, which is 10 percentage points more than in 2011, when 78 % of households owned one.
- In 2020, 64 % of Danish households have a smart TV which is 40 percentage points more than in 2011, when 24 % of households owned a smart TV.
- In 2020, 61 % of Danish households have a tablet/minicomputer, which is 57 percentage points more than in 2011, when 9 % of households owned one.

By way of contrast, the share of Danish households that have a PC/desktop computer fell by 17 percentage points from 53 % in 2011 to 36 % in 2020.

Table 1: Family ownership of electronic devices in the home, percentage share of families. 2011 and 2020

	2011	2020	Difference 2011-2020 in percentage points
Smartphone	33 %	90 %	57
Laptop	78 %	88 %	10
Smart TV	24 %	64 %	40
Tablet PC/minicomputer	9 %	61 %	52
PC/desktop computer	53 %	36 %	-17

Source: Family ownership of electronic devices in the home by type of use: www.statistikbanken.dk/VARFORBR

Universe: Danish families/households

Data processed by The Ministry of Culture Denmark

In addition to the increasing distribution of smart TV, there is an increase in the share of the population[1], who have devices, such as Chromecast and Apple TV, which can be connected to a TV set to enable streaming. In 2020, 46 % of the population use a Chromecast, 20 % have an Apple TV and 28 % have a similar streaming device.

Table 2: Ownership of Apple TV, Chromecast and other streaming devices for use with a TV, percentage share of the population (aged 12+), 2017 and 2020

	2017	2020	Difference 2017-2020 in percentage points
Chromecast in the household	25 %	46 %	21
Another streaming device connected to TV in the household	22 %	28 %	6
Apple TV in the household	17 %	20 %	3

Source: Index Danmark/Gallup – Annual data 2017 and 2020

Universe: The Danish population aged 12+

Data processed by the Ministry of Culture Denmark

The Danes largely own the tools they need to consume digital media. Meanwhile, other devices, e.g. smartphones and tablets, make it considerably easier to use the media outside the home and on

[1] NB: These figures are expressed as a share of the population. The figures above are expressed as a share of Danish households.

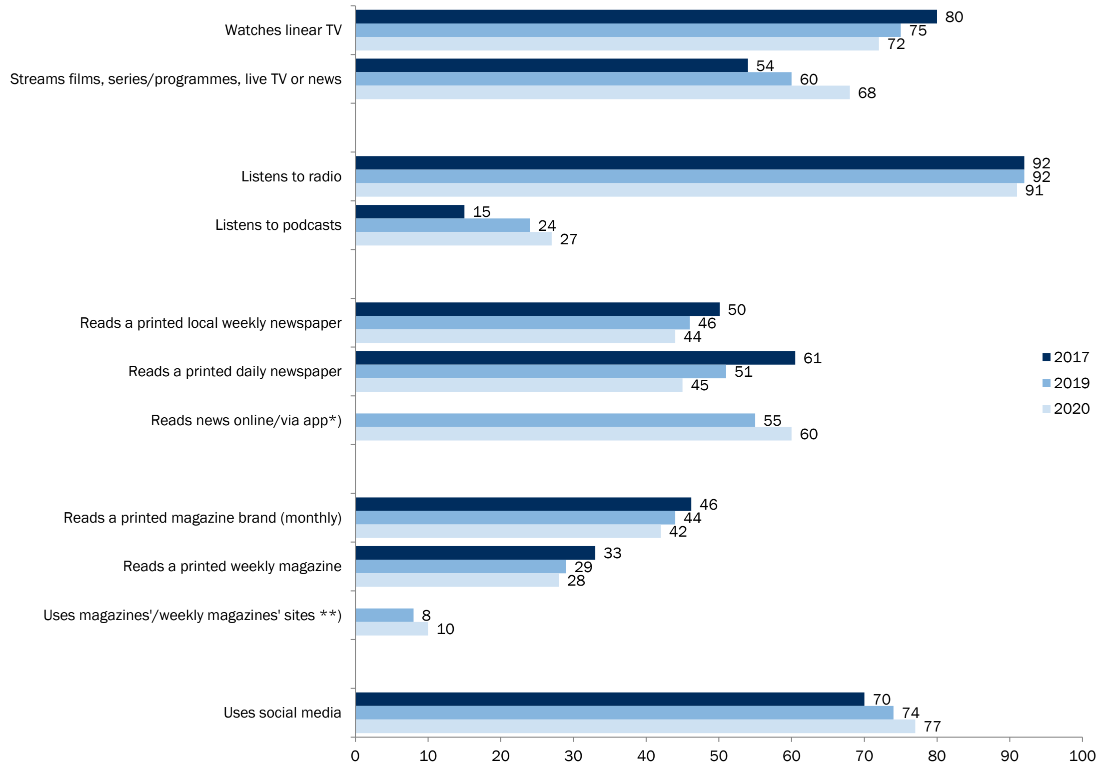
the go. Therefore, digital development means that media consumption has become more mobile as users are now less likely to have to be at a certain place at a certain time to use the media.

2.2 Developments in media consumption

All of the reports that comprise the 'Report on media development in Denmark' show that the use of conventional media, such as linear TV, radio and the printed media, is declining. These developments must be viewed in the light of the fact that a consistently increasing share of the population has access to the digital opportunities offered by the internet and digital devices. A decline in the use of the conventional media does not mean that Danes have stopped using conventional media content, nor does it mean that they spend less time on the media. It means rather that media consumption has shifted to the digital platforms.

Figure 2 provides an overview of these developments. It shows weekly reach for a variety of media types among the Danish population (aged 12+) – with reservations for various calculation methods.

Figure 2: Percentage share of Danes (aged 12+) who use various media types on a weekly basis. 2017, 2019, 2020



Sources: Linear TV: Kantar Gallup Viewer Survey (Broadcast, Live, at least 5 minutes' consecutive viewing); Radio: Kantar Gallup Radio-Meter (at least 5 consecutive minutes' listening); Podcast: Kantar Gallup Lokalradio Index, H2 2017, 2019 and 2020; Daily newspapers, news online /via app, magazine brands, weekly magazines, streaming, social media: Index Danmark/Gallup, Annual data 2017, 2019 and 2020 (printed publications incl. e-publications); Magazines/weekly magazines sites: Index Danmark/Gallup, Annual data 2019 and 2020 (Uses at least one of 17 sites at least once a week); Local weeklies: Local Index Danmark/Gallup, Annual data 2017, 2019 and 2020.

*) This question was first included in the survey in 2019 and in every survey since. / **) Impossible to calculate accurately for 2017.

Universe: The Danish population aged 12+.

Data processed by The Ministry of Culture Denmark

The chart shows that several digital media types are now widely used in the population. For example, in 2020 68 % stream films, series/programmes, live TV or news at least once a week, while 60 % read news online/via apps. These are both up on the 2019 level, by 8 and 5 percentage points respectively. At the same time, 77 % of the population use social media at least once a week, which is an increase from 74 % in 2019 and 70 % in 2017.

However, the use of media types such as podcasts and magazines/weekly magazines' websites is not as widespread in the population – 27 % listen to podcasts and 10 % visit magazines/weekly magazines' sites at least once a week in 2020. However, like the other digital media types, these shares are increasing. To some extent, the opposite applies to the share of the population that uses the more conventional media types. From 2017 to 2020, the share that reads a printed daily newspaper at least once a week has fallen from 61 % to 45 %, while the share that watches linear TV has fallen from 80 % to 72 %.

In 2020, a greater share of the population uses social media on a weekly basis than watches linear TV. However, the decline in the use of linear TV does not mean that this type of media is set to disappear entirely from the Danish media landscape. Most Danes continue to watch linear TV every week. Similarly, in 2020, 91 % of the population listens to radio at least once a week.

Figure 3 and Figure 4 show that it is very largely the younger age groups in the population that carry along the popularity of the digital media types while more people in the older age groups use the conventional media types.

For example, in 2020 93 % of the oldest age group (aged 71+) watch linear TV at least once a week. By way of comparison, this applies to 46 % of the 12-18s and 47 % of the 19-34s.

For printed local weeklies, the disparity between the oldest and youngest age groups is even greater. 82 % of 71+s read a printed local weekly at least once a week, whereas only 12 % of 12-18s do the same.

When we examine the digital media types, 88 % of 12-18s and 93 % of 19-34s stream audio-visual content at least once a week. The share of 19-34s who stream is as great as the share of 71+s who watch linear TV. On the other hand, only 26 % of the 71+ age group stream on a weekly basis.

As for podcasts, this media type is carried along in particular by the 19-34s, as 47 % of this age group listen to podcasts at least once a week.

By way of comparison, 32 % of the 12-18s and 28 % of the 35-54s listen to podcasts on a weekly basis while just 6 % of the 71+ age group listen to podcasts at least once a week.

Figure 3: Percentage share of Danes (aged 12+) weekly users of various conventional media types, by age. 2020

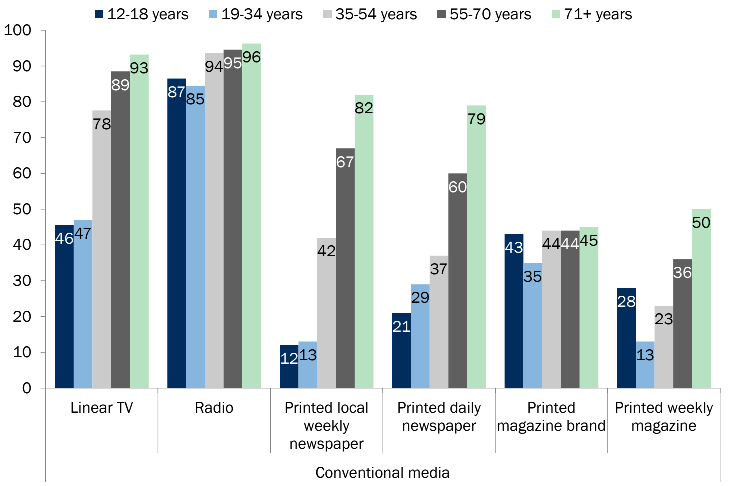
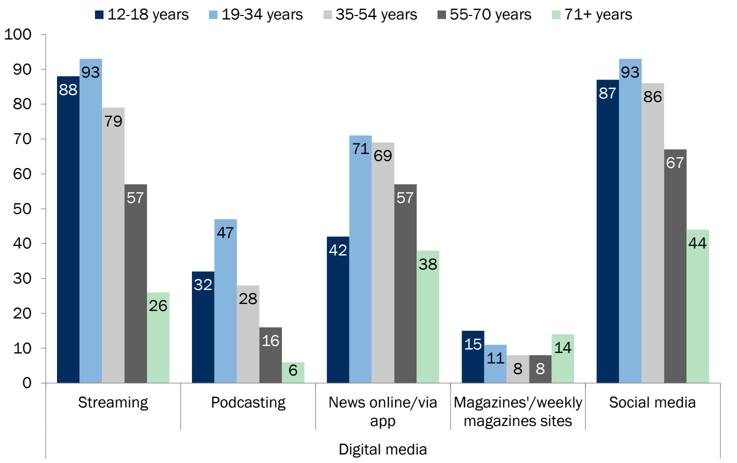


Figure 4: Percentage share of Danes (aged 12+) weekly users of various digital media types, by age. 2020



Source: Linear TV: Kantar Gallup Viewer Survey (Broadcast, Live, at least 5 minutes' consecutive viewing Kantar Gallup Radio-Meter (at least 5 consecutive minutes' listening; Podcast: Kantar Gallup Lokalradio Index, H2 2020; Daily newspapers, news online /via app, magazine brands, weekly magazines, streaming, social media: Index Danmark/Gallup, Annual data 2020 (printed publications incl. e-publications); Magazines/weekly magazines sites: Index Danmark/Gallup, Annual data 2020 (Uses at least one of 17 sites at least once a week); Local weeklies: Index Danmark/Gallup – Annual data 2020.
Universe: The Danish population aged 12+
Data processed by The Ministry of Culture Denmark

The pattern revealed for news online/via apps is slightly different. Again the 19-34s have the greatest share: 71 % within this age group read news online/via apps at least once a week. However, this age group is joined by the 35-54s, 69 % of whom read news online/via apps at least once a week. Next in line are the 55-70s with a 57 % share. On the other hand, the youngest age groups' share is more or less equal to the oldest age groups'. In 2020, 42 % of the 12-18s and 38 % within the 71+ age group read news online/via apps at least once a week.

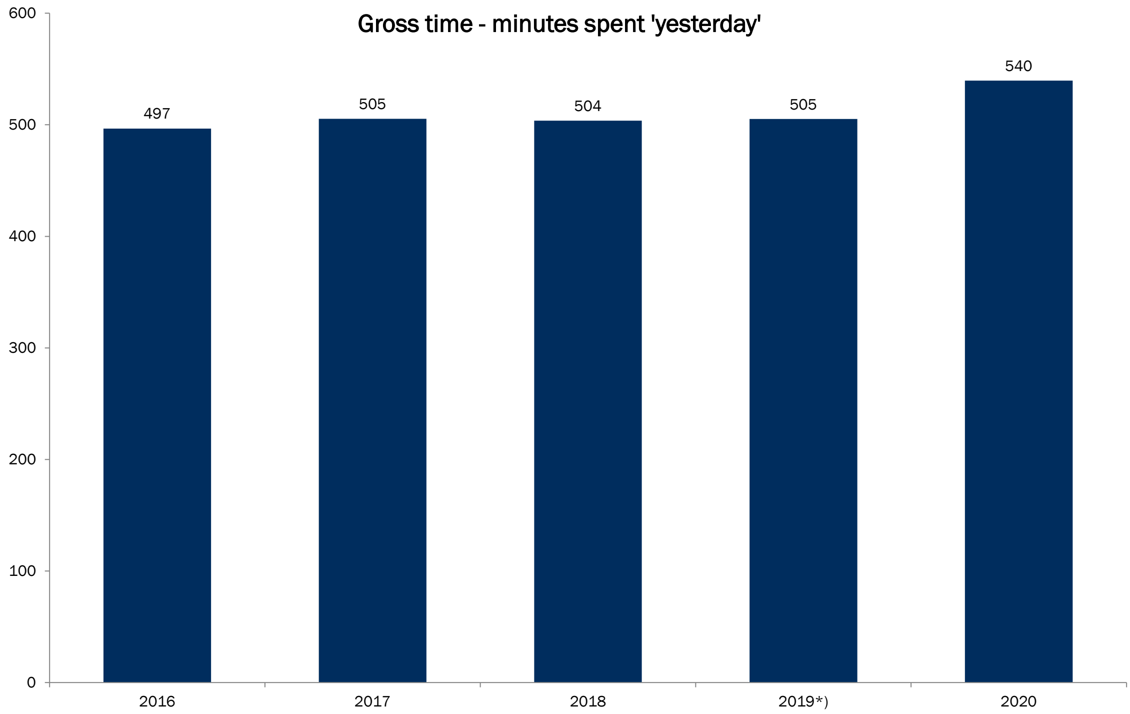
That the youngest lag a considerable distance behind the 19-34s may be due to the fact that the youngest age groups tend generally to consume less news that the other age groups and that they generally prefer to access news via social media.

2.2.1 Danes' gross time consumption on media activities

To illustrate that falling consumption of conventional media does not necessarily mean that Danes are generally spending less time on the media, Figure 5 below shows total gross time spent 'yesterday' on media activities. NB: Please note that respondents were asked questions about time spent on media activities. Their responses are their own estimates for the time they spent on various media activities 'yesterday'. This means that the time consumption data below is not directly comparable with the time consumption data shown in other sections of the report regarding TV, streaming, radio and podcasts.

The respondents were concomitantly asked about the time they spent on specific media types (e.g. How much time did you spend streaming?), which means that there may be overlapping time consumption (e.g. if the respondent streamed via a smartphone). Therefore the figures are for gross time consumption, and do not take overlaps and concomitant consumption into account. The figure is therefore not an absolute, precise expression of how much time the Danes spend on the media but solely illustrates development year on year.

Figure 5: "How much time did you spend yesterday on…". Average time (minutes) spent on 11 different media activities in total, population aged 12+. 2016-2020 *)



Source: Kantar Gallup/Index Danmark/Gallup - Annual data 2016, 2017, 2018, 2019 and 2020
Data processed by the Ministry of Culture Denmark

Universe: The Danish population aged 12+
***)** New method since 2019

Note: Please note that this figure should not be interpreted as expressing the average amount of time per day Danes spend on media activities. Respondents were asked to state how much time they spend on the internet via devices (PC, smartphone, tablet) and also to state how much time they spend on specific activities on these devices (i.e. social media, streaming, etc.). This means that some media activities overlap and the figures do not take concomitant use into account.

The media activities: watching TV (linear TV), internet PC/laptop, smartphone, streaming (films, series, video clips), listening to the radio, social media, tablet/minicomputer, reading a newspaper, reading local weekly newspapers, reading weekly magazines, reading magazines.

Figure 5 above shows that total gross time consumption 'yesterday' was relatively stable from 2016 to 2019. Gross time spent on the media activities fluctuated between 497 minutes and 505 minutes. Gross time consumption was actually greater in 2019 than in 2016. However, in 2020, gross time consumption increased quite considerably. During the period 2016-2020, gross time consumption 'yesterday' increased by 43 minutes, 34 minutes of which are the increase from 2019 to 2020.

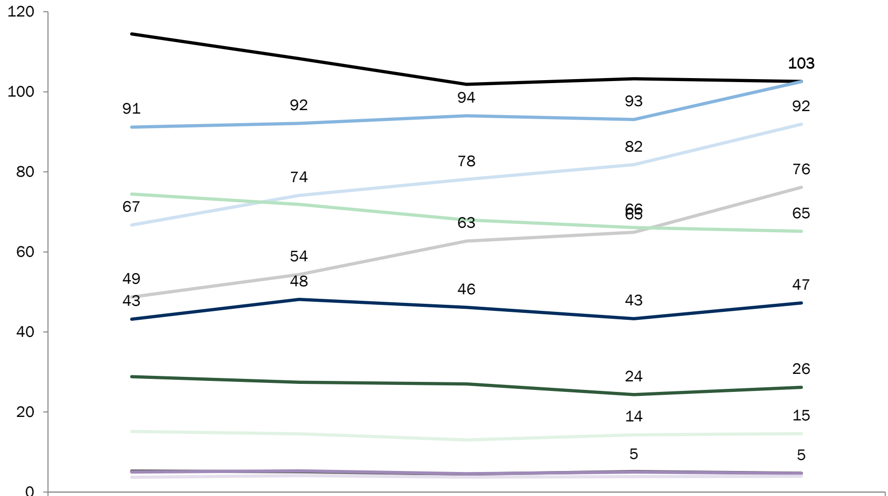
The COVID-19 pandemic is one possible explanation. When large parts of society locked down for a time, people stayed at home more and had more time at their disposal to spend on media activities.

Figure 6 below shows that three activities in particular helped to increase gross time consumption from 2019 to 2020. These were streaming films, series and video clips, which increase by 11 minutes, while internet on PC/laptop and smartphone increased by 10 minutes from 2019 to 2020. Furthermore, there was a smaller increase in time consumption 'yesterday' on social media. The increase was 4 minutes. For the other media activities, time consumption was more or less the same in 2020 as in 2019.

Looking at development over a longer period (2016-2020), the figure shows that consumption of the more conventional media activities such as linear TV and radio is declining, while consumption of digital media activities is increasing. In 2020, Danes spend 103 minutes watching linear TV. This is 11 minutes less than in 2016, when they spent 114 minutes. Time spent listening to the radio has also fallen by 9 minutes from 74 minutes in 2016 to 65 minutes in 2020.

Conversely, the Danish population spent 27 more minutes streaming films, series and video clips and 25 minutes longer on our smartphones in 2020 than in 2016. Moreover, time consumption on the internet on a PC/laptop increased by 12 minutes to 103 minutes in 2020, and therefore on a par with linear TV. Time spent "yesterday' on printed media types, such as newspapers and local weeklies and magazines, has been reasonably stable over the years.

Figure 6: "How much time did you spend yesterday on…". Average time (minutes) spent on different media activities in total, population aged 12+. 2016-2020**)



	2016	2017	2018	2019**)	2020
Watching linear TV	114	108	102	103	103
Internet, PC/laptop	91	92	94	93	103
Smartphone	67	74	78	82	92
Streaming (film, series, video clips)*)	49	54	63	65	76
Listening to radio	74	72	68	66	65
Social media	43	48	46	43	47
Tablet/minicomputer	29	27	27	24	26
Reading newspapers	15	15	13	14	15
Reading local weekly newspapers	5	5	5	5	5
Reading weekly magazines	5	5	5	5	5
Reading magazines	4	4	4	4	4

Source: Kantar Gallup/Index Danmark/Gallup - Annual data 2020
Data processed by The Ministry of Culture Denmark

Universe: The Danish population aged 12+
)** Changed from 2018 to 2019 // *)** New method used since 2019

Focusing on time spent by age, it is clear that the youngest groups in the population are heaviest users of the digital media while the older groups continue to use conventional media.

For example, the 12-18s and 19-34s spent 47 minutes of 'yesterday' watching linear TV, while the 55-70s and 71+ age group spent 147 minutes and 173 minutes, respectively. For the 71+ age group, this was in fact a 10-minute increase compared to 2016.

Conversely, the two youngest age groups spent 126 and 127 minutes respectively of 'yesterday' streaming films, series and video clips, while the oldest (aged 71+) spent only 18 minutes on this particular media activity category.

Although the older age groups do not spend as much time on digital media as younger groups, their digital time consumption is increasing. The 55-70s spend 23 minutes more on their smartphones in 2020 than in 2016, while the 71+ age group spends 8 minutes more. Similarly, these two age groups spend 9 minutes and 5 minutes more respectively on social media.

Table 3: "How much time did you spend yesterday on…". Average time (minutes) spent on different media activities, population aged 12+, by age, 2016-2020**)

		Total	12-18	19-34	35-54s	55-70	70+
Watching TV (linear TV)	**2016**	114	63	80	112	146	162
	2020	103	47	47	96	147	173
Internet, PC/laptop	**2016**	91	152	133	83	60	40
	2020	103	165	150	96	71	45
Smartphone	**2016**	67	123	118	63	24	15
	2020	92	170	142	94	47	23
Streaming (films, series, video clips)*)	**2016**	49	106	93	35	12	10
	2020	76	126	127	74	35	18
Listening to radio	**2016**	74	22	52	82	96	97
	2020	65	21	39	68	89	93
Social media (Facebook, Twitter, LinkedIn, etc.)	**2016**	43	99	77	34	16	7
	2020	47	106	76	40	24	12
Tablet/minicomputer	**2016**	29	49	28	32	24	14
	2020	26	38	19	28	29	22
Reading a newspaper	**2016**	15	6	6	9	23	41
	2020	15	5	5	9	20	39
Reading local weekly newspapers	**2016**	5	5	2	3	7	13
	2020	5	4	2	3	6	11
Reading weeklies	**2016**	5	6	2	2	7	14
	2020	5	5	2	3	6	12
Reading magazines	**2016**	4	5	3	3	4	6
	2020	4	4	3	3	5	8

Source: Index Danmark/Gallup – Annual data 2016 and 2020
Data processed by The Ministry of Culture Denmark
*) Changed from 2018 to 2019 **) New method used since 2019

Universe: The Danish population aged 12+

3 NEWS CONSUMPTION AND MEDIA COMPENSATION DURING THE COVID-19 PANDEMIC

The period since Denmark locked down in March 2020 in response to the COVID-19 pandemic brought radical changes compared to previous years. Media consumption was also affected. This section examines how the Danes consumed news and regular TV and radio programmes in 2019 and 2020. Moreover, we examine the schemes introduced to compensate the media for the loss of advertising income caused by the pandemic and how compensation sums were distributed.

3.1 Consumption of news and regular TV programmes in 2019 and 2020

TERMS, PROGRAMME CATEGORIES AND TV CHANNELS

Reach

Reach (Rch(000)) is a cumulative figure for the number of viewers reached by the channel or channels stated for at least five consecutive minutes of a given period. Reach describes the total number of people who, within a given period of time, have watched a programme or TV channel for at least five consecutive minutes.

Viewing time

Viewing time is the average daily minutes spent on TV throughout the universe.

Programme categories

News:

The analyses of news consumption on TV include only general news broadcasts. Sports news is filtered out.

General programmes:

The analyses of viewing time spent on general TV programmes include sports news whereas general news programmes are filtered out.

Channels

The analysis of news comprises data runs conducted for DR1, DR2, TV 2 and TV 2/NEWS.

The analysis of general programmes comprises data runs conducted for total TV (TTV).

Activities

The analyses are made for live viewing and same-day viewing (viewed on same day as live – VOSDAL), i.e. Live+VOSDAL but does not include time-shifted viewing, i.e. viewing up to seven days after first showing.

Weekly average

All data runs are made at daily level and subsequently recalculated as a weekly average.

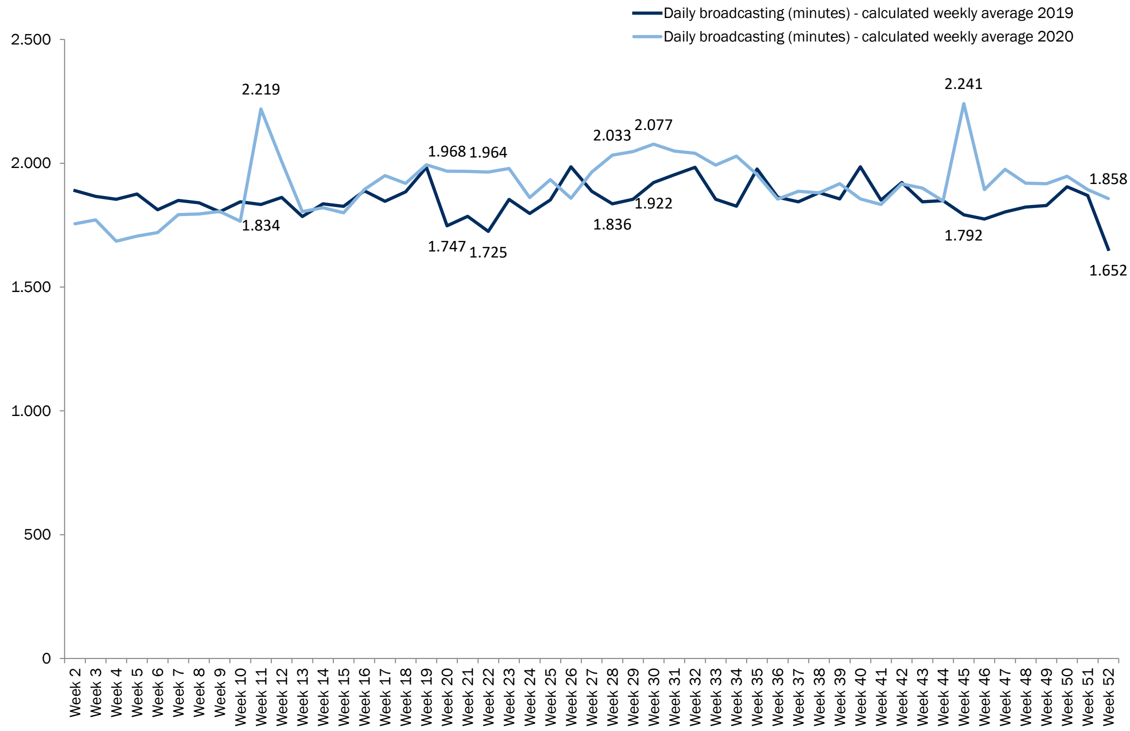
3.1.1 TV news

Summary and discourse 2020 showed that the COVID-19 crisis had clear impact on news consumption in week nos 11-23 in 2020 (9 March - 7 June) compared to the corresponding weeks in 2019 (11 March - 9 June) with regard not only to how many people on an average day watched at least five minutes consecutive news, but also to how many minutes of news they watched per day.

In this year's Summary and discourse, we can show how daily TV news consumption developed throughout 2020 compared to 2019.

It is initially relevant to know that, for certain longer periods of time, more general news was broadcast on TV (at times, significantly more) than in the corresponding periods of 2019. See Figure 7 under.

Figure 7: Average broadcasting time (minutes) for general news on DR1, DR2, TV 2 and TV 2/NEWS in 2019 and 2020. Calculated weekly average.



Source: Kantar Gallup Viewer Survey
Data processed by the Ministry of Culture Denmark
Universe: Total TV

Figure 8 under shows that almost throughout 2020, a greater number of Danes (aged 3+, accumulated daily total) watched at least five consecutive minutes' news broadcast on DR1, DR2, TV 2 or TV 2/NEWS than in 2019.

In particular, in the weeks following the first major lockdown that was announced at a press conference at the Prime Minister's Office on 11 March 2020 and subsequent press conferences on 13 March and 15 March (all three press conferences in week no. 11, 2020), plus a further press conference on 17 March (week no. 12) meant the news reach was very high compared to the corresponding weeks in 2019. A further contributory factor to very high viewing statistics in week no. 12 was Her Majesty Queen Margrethe's speech broadcast live on 17 March. The Queen's speech was the most watched speech ever televised in Denmark (her speech was categorised as "news"). In week no. 11 of 2020, there was an average of 834,000 more people and in week no. 12 of 2020 844,000 more people who watched news for at least five consecutive minutes during a day.

In general, the peaks of the 2020 curve in the graph (Figure 8) correspond to the Prime Minister's press conferences held in 2020 about the COVID-19 situation.

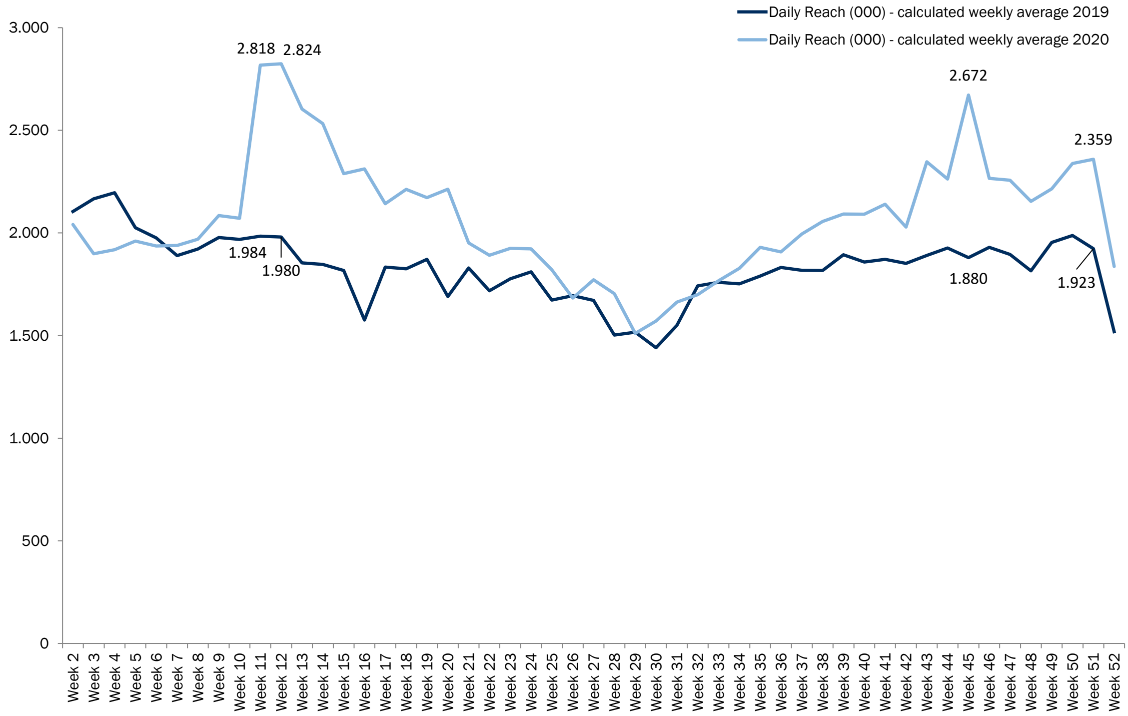
In addition to the press conferences in week nos 11 and 12 mentioned above, there was also:

- A press conference on 14 April 2020 (week no. 16) about Phase 1 of reopening that included a gradual reopening of childcare institutions and schools for nursery and junior students, and the reopening of parts of the healthcare sector (736,000 more daily viewers).
- A press conference on 12 May 2020 (week no. 20) about Phase 2 of reopening (522,000 more daily viewers).
- A press conference on 23 October 2020 (week no. 43) introduced further restrictions and a recommendation to continue to work from home until 2 January. Restrictions on opening hours for

bars and restaurants, further requirements to wear face masks and a ban on sales of alcohol after 22:00 were also announced (457,000 more daily viewers).

- A press conference on 4 November 2020, (week no. 45), at which the Prime Minister announced the cull of all mink in Denmark and another on 5 November 2020 (week no 45) announcing the lockdown of seven Northern Jutland municipalities in response to the mink situation and a mutation of the COVID-19 virus (436,000 more daily viewers).

Figure 8: Average daily reach (1,000s) for general news on DR1, DR2, TV 2 and TV 2/NEWS in 2019 and 2020. Calculated weekly average.



Source: Kantar Gallup Viewer Survey
Data processed by the Danish Ministry of Culture

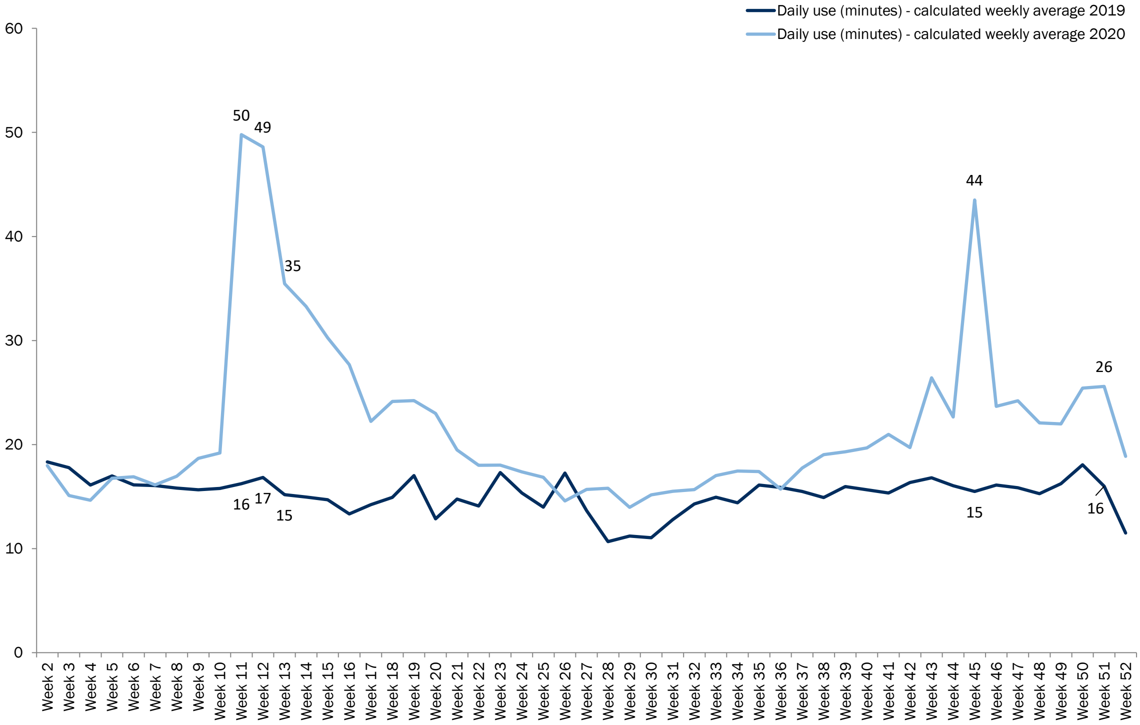
Universe: The Danish population aged 3+

To a certain extent, the Prime Minister's press conferences also impacted on the average number of minutes people spent on watching the news on one or more of the four channels included in the analysis. See Figure 9 under.

Therefore, the population watched significantly more daily minutes of news in 2020 than in 2019, largely in the following weeks:

- Week no. 11: 34 minutes more in 2020 than in 2019
- Week no. 12: 32 minutes more
- Week no. 13: 20 minutes more, falling gradually to 14 minutes in week no. 16
- Week no. 45: 28 minutes more in 2020 than in 2019

Figure 9: Average viewing time (minutes) for general news on DR1, DR2, TV 2 and TV 2/NEWS in 2019 and 2020. Calculated weekly average.



Source: Kantar Gallup Viewer Survey
Data processed by the Ministry of Culture Denmark

Universe: The Danish population aged 3+

3.1.2 General TV programmes

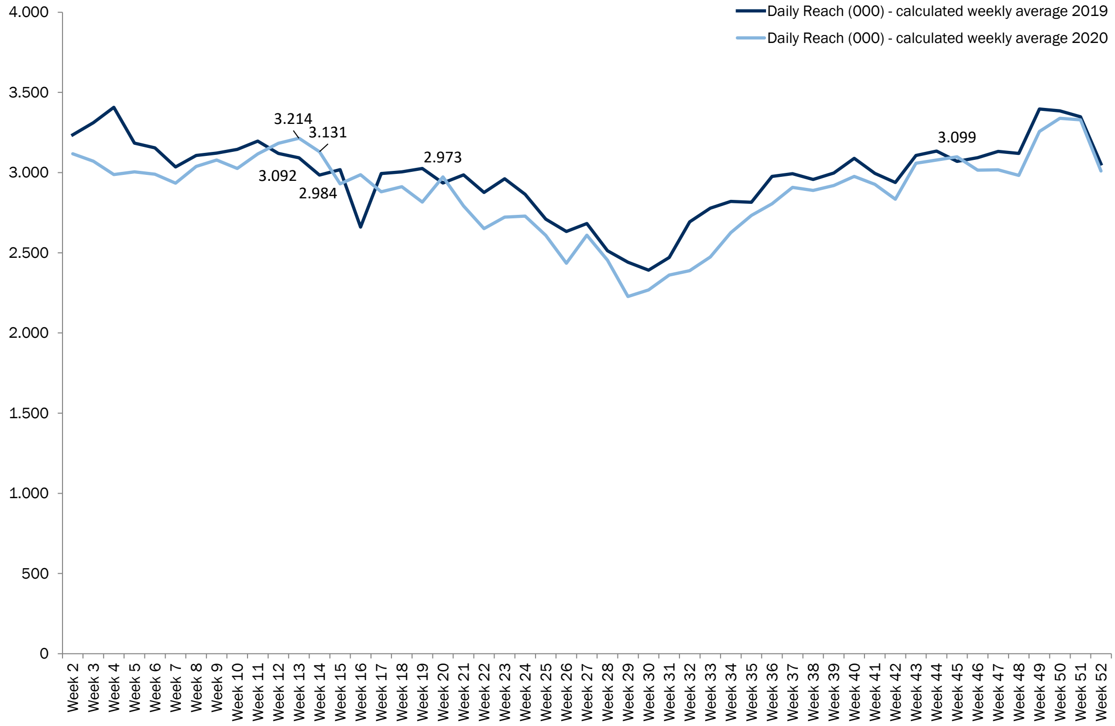
The survey also examined whether increased news viewing in 2020 in response to the COVID-19 pandemic has a knock-on effect on viewing of general TV programmes.

Figure 10 under shows that this was apparently not the case.

On only a few occasions in 2020 did more people view general TV programmes (all programmes except general news but including sports news) than in 2019. At the general level, average daily reach of regular TV programmes was lower in 2020 than in 2019.

The weeks in which there was higher daily reach in 2020 than in 2019 were week nos 13, 14, 20 and 45.

Figure 10: Average daily reach for general programmes (except for general news) on TV (TTV, Total TV) in 2019 and 2020 (1,000s). Calculated weekly average.

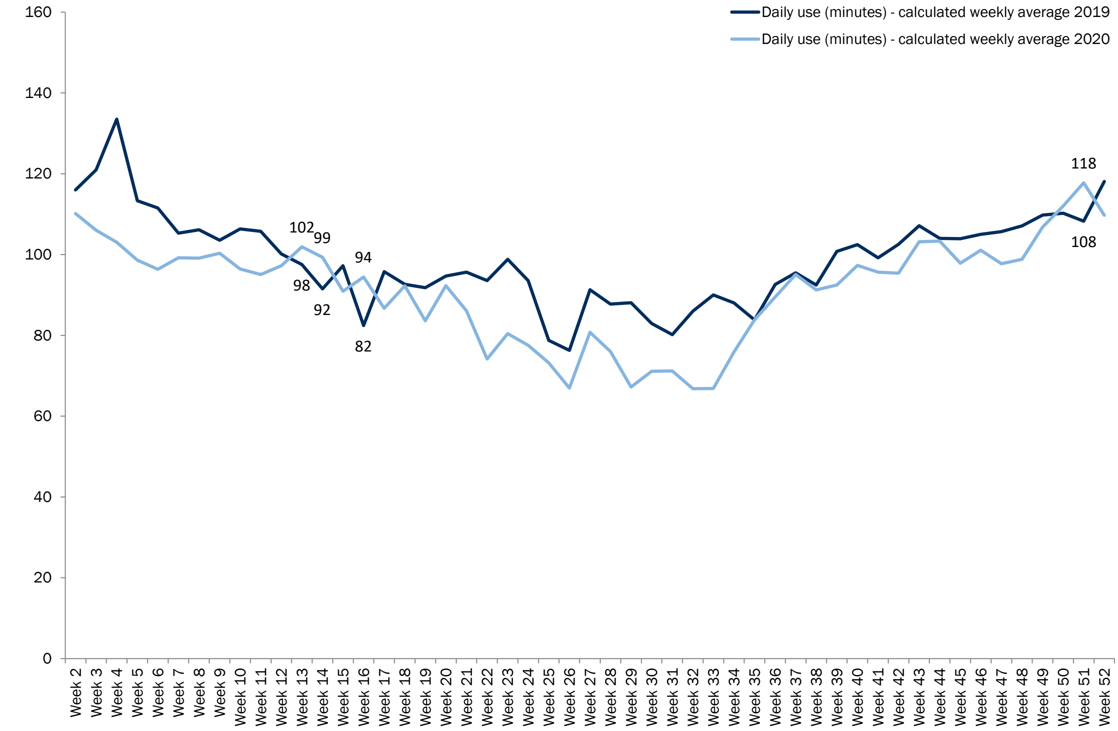


Source: Kantar Gallup Viewer Survey
Data processed by the Ministry of Culture Denmark

Universe: The Danish Population aged 3+

Minutes per day spent watching general TV programmes was also almost consistently generally lower in 2020 than in 2019. See Figure 11 under. It was only in week nos 13, 14, 16 and 51 that viewing time in 2020 exceeded the 2019 level.

Figure 11: Average daily viewing time (minutes) for general programmes (except for general news) on TV (TTV, Total TV) in 2019 and 2020. Calculated weekly average.



Source: Kantar Gallup Viewer Survey
Data processed by the Danish Ministry of Culture

Universe: The Danish Population aged 3+

3.2 Consumption of news and radio programmes in 2019 and 2020

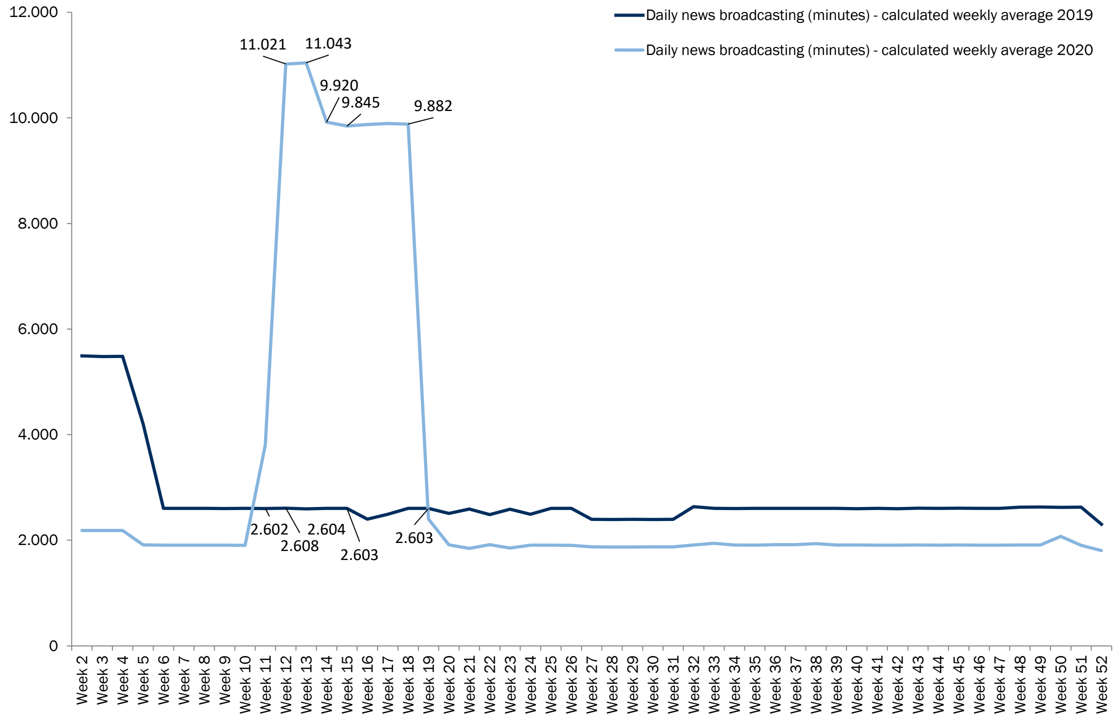
TERMS, PROGRAMME CATEGORIES AND RADIO STATIONS
Reach For explanation, see table in section 3.1 over
Listening time Listening time is the average daily minutes spent listening to the radio throughout the universe.
Programme categories News: The analyses of news consumption on the radio focus on radio news bulletins. This category also includes sports news. Unlike the TV survey, the radio survey does not distinguish between general and sports news. Therefore, this category potentially includes general news and sports news. General programmes: The analyses of listening to general radio programmes does not include news. See above. In the radio analyses, splitting data runs into general news and sports news is not possible.
Channels The listening analyses for news and general programmes on the radio are based solely on data runs for DR (DR Total) as DR is the only media company that consistently codes radio programmes by programme category.
Weekly average All data runs are made at daily level and subsequently recalculated as a weekly average.

3.2.1 Radio news bulletins

With regard to radio news bulletins, it is relevant to describe broadcasting volume for news on DR's radio stations.

Figure 12 under shows that, during week nos 11-18 in 2020, DR radio stations broadcasted significantly more news than in the corresponding weeks of 2019. In all other weeks of 2020, DR broadcasted less news than in 2019.

Figure 12: Average daily news broadcasted (minutes) on DR (DR Total) in 2019 and 2020. Calculated weekly average.



Source: Kantar Gallup/Radio-Meter
Data processed by the Ministry of Culture Denmark

Universe: DR Total

With regard to listening to the news on radio (DR Total), in a seven-week period (week nos 12-18) of 2020, reach and listening time were both significantly higher than in the corresponding weeks of 2019. The graphs reflect the development in broadcasting time, where especially listening time developed more or less identically with broadcasting time.

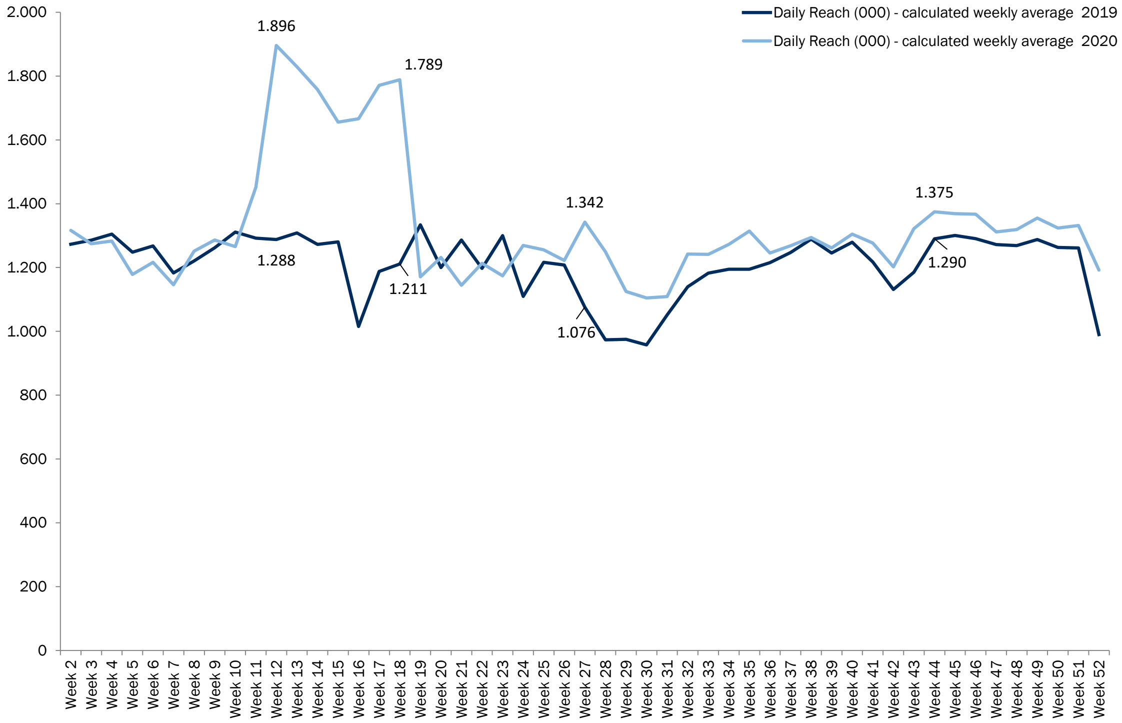
In week no. 12, the accumulated daily average was 608,000 more listeners who had listened to at least five consecutive minutes of news on DR in 2020 than in 2019. In week 16, there were 651,000 additional listeners. In week 15, the difference was 375,000, the lowest in the seven-week period in question.

In week nos 27, 28 and 52, significantly larger numbers of listeners listened to news programmes on DR radio stations in 2020 than in 2019 (266,000, 275,000 and 202,000, respectively). With exception of week nos 19, 21, and 23 and the period just prior to the onset of the COVID-19 pandemic, the accumulated number of people who listened to news broadcasts on a daily basis is generally higher in 2020 than in 2019.

During week nos 12-18 in 2020, the average daily time spent listening to DR's news broadcasts ranged from 37 (week no. 15) to 47 (week no. 12) minutes more than in 2019. During the remainder of the year, listening time was generally (with isolated exceptions) one to three minutes less in 2020 than in 2019. This means that more people listened to the news, but it was only during a shorter period of the year that they listened for longer.

This is shown in Figure 13 and Figure 14 under.

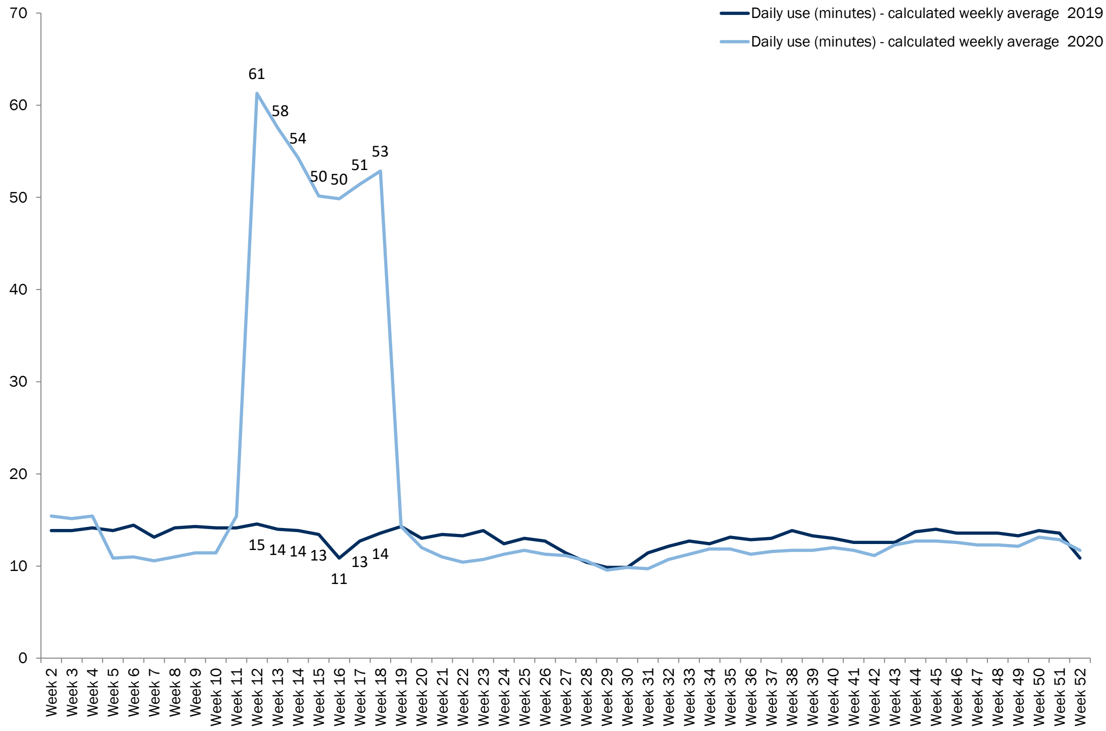
Figure 13: Average daily reach for DR news (DR Total) in 2019 and 2020 (1,000s, Rch(000)). Calculated weekly average.



Source: Kantar Gallup/Radio-Meter
Data processed by the Ministry of Culture Denmark

Universe: The Danish Population aged 12+

Figure 14: Average daily listening time (TAud(All) [minutes]) for news on DR (DR Total) in 2019 and 2020. Calculated weekly average.



Source: Kantar Gallup/Radio-Meter
Data processed by the Ministry of Culture Denmark

Universe: The Danish population aged 12+

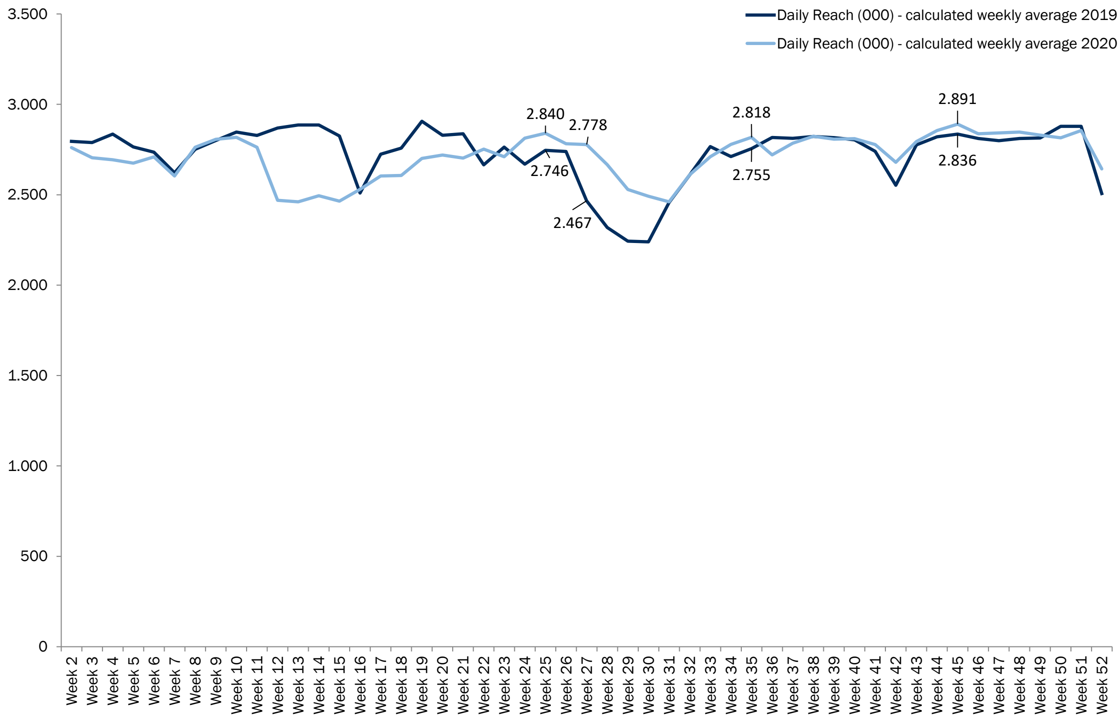
3.2.2 General radio programmes

If we look at average daily reach and listening times for general programmes on DR radio stations, in the weeks following the first major lockdown, significantly fewer daily listeners listened to general radio programmes on DR in 2020 than in 2019.

In week no. 12, the average daily number of listeners was 400,000 fewer, in week no. 13, 425,000 fewer, in week no. 14, 391,000 fewer and in week no. 15, 361,000 fewer listeners. In week nos 17-21 too, there were significantly fewer daily listeners in 2020 than in 2019 – ranging from 110,000 fewer in week no. 20 to 205,000 fewer in week no. 19. These figures are a consequence of the fact (see above) that the number of people who listened to news on DR's radio stations significantly increased in the same period.

On the other hand, during the summer months, particularly in week nos 27-30, significantly more people listened to general radio programmes on DR's radio stations in 2020 than in the corresponding weeks in 2019. This may be due to travel restrictions that applied across most of the world for much of 2020. Restrictions meant that a considerable share of the Danish population spent their summer holidays in Denmark, which may explain why more people listened to general radio programmes at that time.

Figure 15: Average daily reach for general programmes (not including news) on DR (DR Total) in 2019 and 2020 (1,000s, Rch(000)) Calculated weekly average.

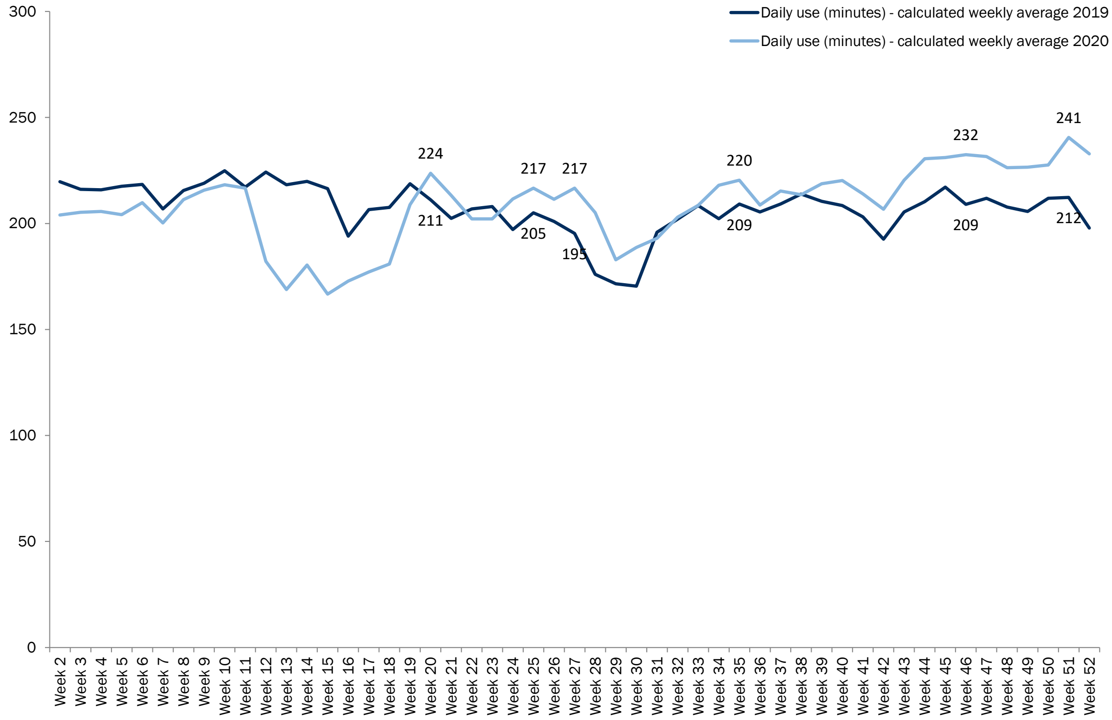


Source: Kantar Gallup/Radio-Meter
Data processed by the Ministry of Culture Denmark

Universe: The Danish population aged 12+

In week nos 12-18 of 2020, time spent listening to general programmes on DR's radio stations was affected by people's spending more time listening to the news. During this period, average daily listening time ranged from 21 minutes (week no. 16) to 50 minutes less in 2020 than in 2019. In the weeks from New Year until the first major lockdown, people listened less to the radio (between three (week no. 9) and 16 (week no. 2) minutes less). Conversely and with relatively few exceptions, in the period from week no. 20 until the end of 2020 people listened more to general programmes on DR radio stations in 2020 than in 2019.

Figure 16: Average daily listening time (TAud(All) [minutes]) for general programmes (not including news) on DR (DR Total) in 2019 and 2020. Calculated weekly average.



Source: Kantar Gallup/Radio-Meter
Data processed by the Ministry of Culture Denmark

Universe: The Danish population aged 12+

3.3 COVID-19 compensation schemes

Among steps taken to counteract the effects of the COVID-19 pandemic, the Danish authorities set up funding and subsidies for the media industry. The largest scheme in 2020 that aimed to support the media types included in the 'Report on media development in Denmark' was a pool designed to compensate for lost advertising revenue. In 2021, the authorities tabled additional funding for cancelled and postponed TV productions and a scheme to subsidise weekly newspapers adversely affected by COVID-19. For a complete list of schemes in the culture sphere, see The Ministry of Culture Denmark's website (information available only in Danish): Hjælpepakker og initiativer (kum.dk).

Furthermore, the Danish authorities also introduced compensation packages intended not solely for the media industry, but available to all industries. These packages include a salary compensation scheme, fixed costs compensation scheme and a scheme that granted compensation to the organisers of major events.

3.3.1 Extraordinary compensation for lost advertising revenue

Danish[2] media players could apply to receive up to 80 % compensation for advertising revenue lost in the first lockdown period, i.e. from 9 March to 8 July 2020. Media players could apply for compensation if they had lost at least 30 % of advertising revenue in the period mentioned, compared to a so-called "reference period", essentially defined as an average four-month operating period in 2019.[3] The conditions stipulated that compensation would be provided as long as the same losses were not compensated for by another compensation scheme.

This scheme was devised specifically for commercial radio and TV stations, printed news media, podcasts, printed and digital daily newspapers, independent digital news media, weekly magazines, magazines and trade magazines, etc. (for a full list, see slks.dk). The scheme was subdivided into

[2] To qualify to receive compensation, applicant media companies had to have a Danish CVR (VAT) number, a requirement for all Danish companies and businesses whose annual turnover exceeds DKK 50,000. Media companies lodged applications for compensation on behalf of relevant media titles, e.g. Jysk Fynske Medier P/S applied on behalf of, among others, Århus Stiftstidende.
[3] If the reference period failed to give an accurate basis for compensation, the media were permitted, working with an independent auditor, to select an alternative reference period. For more details, read here.

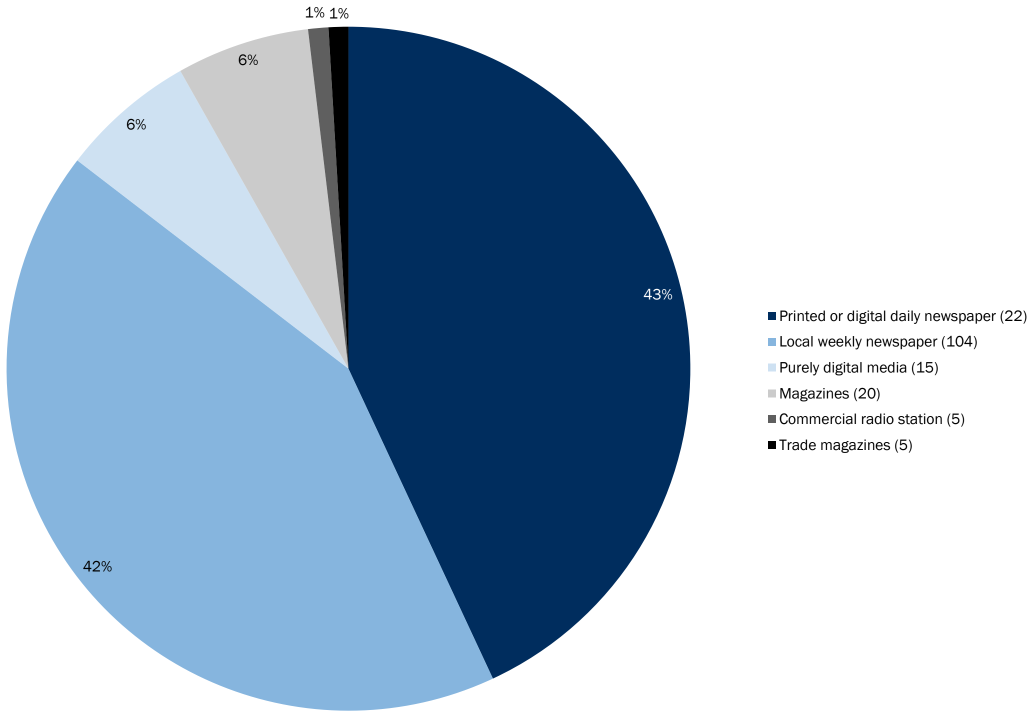
two rounds. The first round was available to all of the above-mentioned media that receive no editorial production subsidy. Media that do receive editorial production subsidy could apply for compensation in the second round. A total of 171 media received a total of DKK 142 million from the scheme. The authorities had reserved DKK 234.6 million, i.e. 61 % of the total pool was paid out.

In the first round of applications, 143 different media received a total of DKK 79 million in compensation. Most of the first-round applicants were weekly magazines, local newspapers and magazines.

In the second round, 28 media received a total of DKK 63.1 million in compensation. This round was open only to media that receive editorial production subsidy. Therefore, the field of applicants was smaller. The largest second-round pay-outs went to major, national daily newspapers, such as Børsen, B.T., Politiken and Jyllands-Posten.

First and second-round compensation payments are illustrated in Figure 17. The chart shows that printed or digital daily newspapers and local newspapers together received 85 % of total pay-out from the pool, while purely digital media and magazines each received 6 % and the commercial radio stations and trade magazines each received 1 %.

Figure 17: The media categories' percentage share of total payments from the extraordinary compensation scheme for lost advertising revenue in 2020 and 2021. (Figures in brackets = number of media titles included in the category).



Source: Danish Agency for Culture and Palaces
Data processed by the Ministry of Culture Denmark

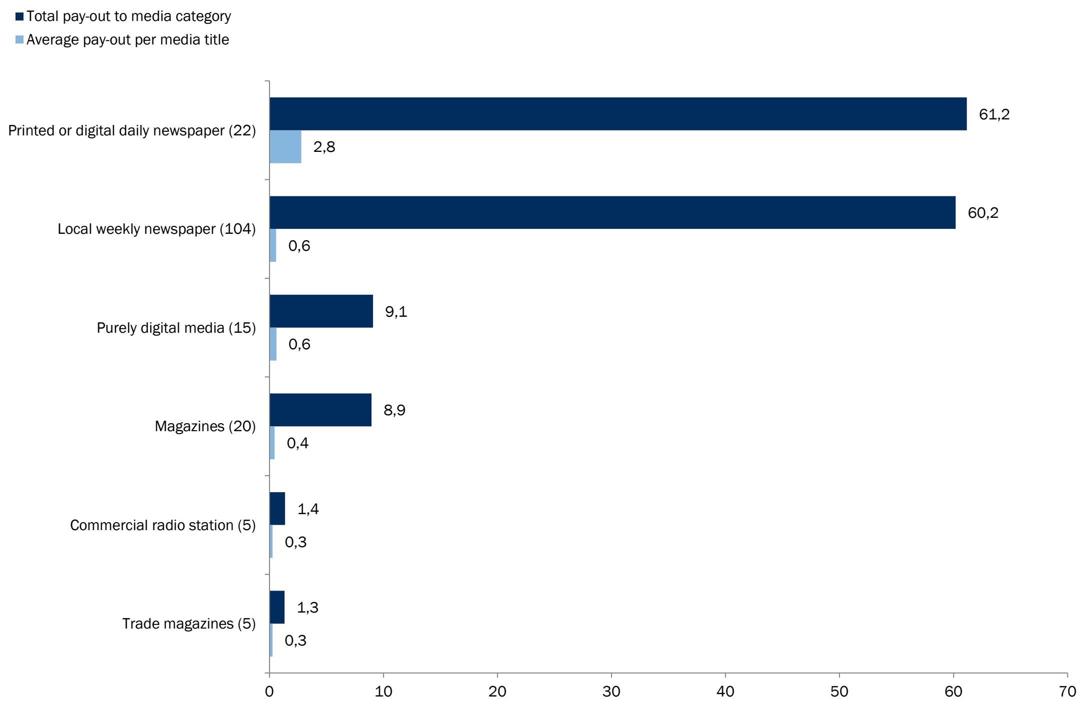
Universe: Danish media titles that recieved funds from extraordinary pool of funding to compensate media companies for lost advertising revenue due to COVID-19 in 2020 and 2021

The sum paid out per media category in MDKK is shown in Figure 18. The chart shows that the printed and digital daily newspapers received DKK 61.2 million in compensation for lost advertising in the period 9 March to 8 July 2020. Printed and digital daily newspapers is thus the category that received the largest total compensation sum. Twenty-two daily newspapers received average compensation for lost advertising of DKK 2-8 million. The sums paid out varied widely, ranging from DKK 94,000 to one media to DKK 12.9 million to another.

While daily newspapers received the largest total pay-out, the local newspapers media group comprises most publications. 104 local weekly newspapers received a total of DKK 60.2 million, corresponding to an average pay-out of DKK 579,000 per media. Although the category comprises most media titles, these 104 local weekly newspapers are far from being all the weekly newspapers in Denmark. There are no up-to-date figures for the number of weekly newspapers in Denmark in 2020.

However, there are some estimates. A Mediascale report estimates that there are 218 printed local weekly newspapers in 2020, whereas an IRM report on the Danish Advertising Market in 2020 (H1) estimates that the number of free, local weekly newspapers in H1 2020 is 226.[4] Based on these two estimates, about half of Denmark's printed weekly newspapers received advertising compensation in 2020.

Figure 18: Total sum (MDKK) paid out to Danish media by media category. The figures in brackets are the number of media titles in the category that have received compensation for lost advertising revenue.



Source: Danish Agency for Culture and Palaces
Data processed by the Ministry of Culture Denmark

Universe: Danish media titles that recieved funds from extraordinary pool of funding to compensate media companies for lost advertising revenue due to COVID-19 in 2020 and 2021

In addition to daily and weekly newspapers, magazines, purely digital media, commercial radio stations and trade magazines also received compensation for lost advertising revenue.

Twenty magazines received a total of DKK 8.9 million, and fifteen purely digital media received a total of DKK 9.1 million, while the commercial radio stations and trade magazines received DKK 1.4 million and DKK 1.3 million respectively (= a total of 2 % of total pay-outs).

3.3.2 Other media funding in 2021

A scheme for cancelled and postponed TV productions arrived in 2021. The purpose of the scheme is to compensate TV production companies for costs incurred as a result of cancelling and/or postponing productions in the period 11 March 2020-22 May 2020. There is DKK 24.2 million in the pool. The deadline for applications was 19 April 2021. The scheme has since been revised and reopened for productions excluded from the first round. The new deadline for application was 31 August 2021. In the first round of applications, productions that had received any kind of DFI support were not eligible to apply for funding from this pool. In the second round, productions that have received funding other than production subsidies, are now eligible to apply.

Furthermore, a scheme to compensate weekly newspapers adversely affected by COVID-19 is now in place. The authorities set up this scheme to benefit printed and digital weekly newspapers whose advertising revenue fell in the period 14 December 2020 until 28 February 2021 due to the Danish authorities' response to the COVID-19 situation. This pool contains DKK 38.8 million.

[4] 218 local weekly newspapers - Is that many? (mediascale.dk) and Det Danske Reklamemarked 2020, Advertising Consumption Survey, IRM, P22

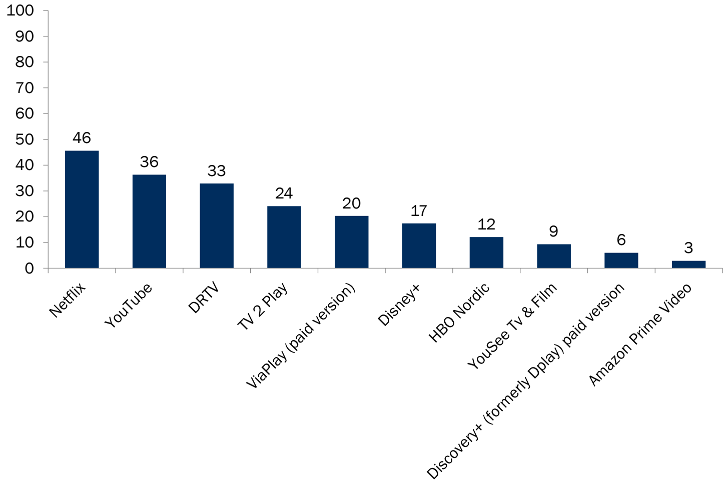
4 CHANGES IN MEDIA MARKET PLAYERS

During the past year, new players, both large and small, have entered the Danish media market, and there were several important acquisitions and mergers on the international content and streaming market. Moreover, publication and distribution of some of the most influential pre-existing Danish media have undergone significant changes.

Possibly the largest new player in Denmark, the **Disney+** streaming service arrived in Denmark in September 2020 with The Mandalorian, a Star Wars spin-off series, as the main attraction. Within a very short time, **Disney+** has amassed more than 100 million paying customers across the globe[5]. In Q1 2021, 17 % of Danes (internet users, 15-75 years) used this service at least once a week.

This is a significantly larger share than e.g. Amazon Prime Video (3 %), Discovery+ (6 %) and HBO Nordic (12 %), but a long way off the market share enjoyed by TV 2 Play (24 %) and Netflix (46 %).[6]

Figure 19: The share of Danes that use the service at least once a week, Q1 2021, aged 15-75



Source: Kantar Gallup Digital Life 2021 – Deep Dive Streaming. Data processed by The Ministry of Culture Denmark
Universe: Danish internet users aged 15-75

However, Disney+'s market share is no longer growing. Figures from DR Media Research/Kantar Gallup (that has a slightly different universe; Danish population aged 4+) indicate that the share of Danes who use this service at least once a week was stable at 19-24 % in the period January-May 2021, including 21 % in May.

DR added to the apparently constant flow of streaming services when the corporation launched **DR Minisjang** in September 2020. This service, which is available either via DRTV or via a dedicated app, is specifically aimed at the youngest audiences (age 1-3 years).[7].

Furthermore, late in 2021, HBO Nordic will become **HBO Max.** Seen from the consumer's perspective, this is likely to bring an influx of films to this service[8]. Associated with this move, AT&T announced in May 2021 that WarnerMedia (that operates HBO, WarnerBros. and CNN) will merge with Discovery. The merger is expected to take effect in mid-2022. The merger will result in a new giant on the streaming market called **WarnerBros. Discovery**.[9]

In a similar move on the global media scene, **Amazon** (that operates the Amazon Prime Video streaming service) announced in May 2021 that, in a bid to strengthen its position on the content market, it would be acquiring **MGM Studios** for more than USD 8 billion. These significant changes

[5] As of April 2021, see The Walt Disney Company quarterly accounts, Q2 2021.
[6] NB: there are minor discrepancies (other surveys, target group and periods) for players other than Disney+ compared to the TV and streaming survey in the Report on media development in Denmark, The Ministry of Culture Denmark, 2021
[7] See DR
[8] See Soundvenue.com
[9] See AT&T and Wall Street Journal

come in the wake of a series of important acquisitions and mergers on the content and streaming market in recent years.[10]

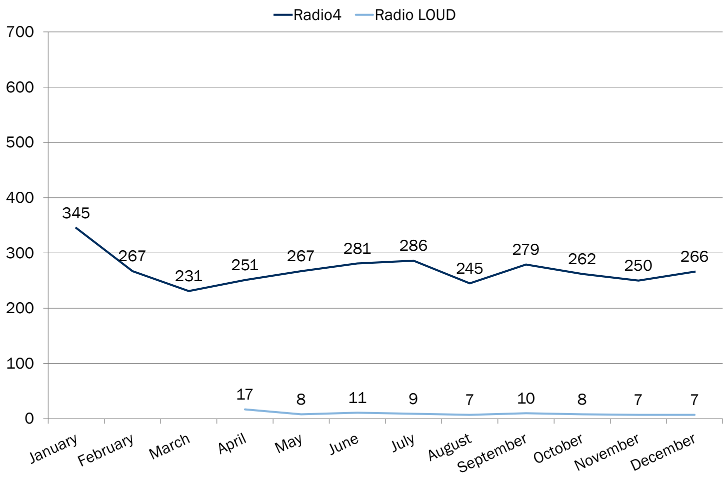
On the Danish market, the distribution of **Discovery**'s 11 channels changed considerably in early 2020 when the company's distribution agreement with YouSee was not renewed. As a result, **Discovery**'s share of viewers fell from 9 % in 2019 to 5 % in 2020[11]. Conversely, YouSee's own channel, **Xee**, seems to have got off to a good start. Launched in early 2019, Xee's average weekly reach increased from 6.3 % in 2019 to 9.3 % in 2020[12]. One important reason for its progress is probably that Xee began to broadcast English Premier League football matches in Q2 2019. Another new service, **TV 2 SPORTX**, was launched in 2020. In 2020, this service had 3.4 % weekly reach.

The year 2020 was the first full year for podcast service **Podimo**. In H2 2020, 2 % of Danes said they had listened to Podimo podcasts within the last week[13]. This is a relatively small market share but noteworthy as Podimo is a subscription-based service in a podcast market that has a generous supply of free content. Nevertheless, recruitment at the company responsible for Podimo suggests that it is investing relatively heavily in the service. According to cvr.dk, from October 2019 to February 2021, Podimo increased employment from 19 to 34 FTE.

A DAB station called **Radio LOUD** hit the airwaves in April 2020. From day one, the station's listening figures were relatively low. In the period from April to December 2020, the station had an average of 11,000 weekly listeners. The station achieved its highest no. of weekly listeners (17,000) during its first month.

Radio4 started in November 2019. This radio station had an average of 301,000 weekly listeners in 2020. The highest number of weekly listeners was 345,000, achieved in the first month of the year. Radio4 broadcasts on an FM frequency, while Radio LOUD is a DAB channel. This may affect the number of listeners.

Figure 20: Weekly reach (1,000s) Radio4 and Radio LOUD, by month. 2020



Source: Kantar Gallup Radio-Meter Data processed by The Ministry of Culture Denmark
Universe: The Danish population aged 12+

There have also been several major changes in the written media. Following a number of years, in which closures, mergers and falling employment were characteristic in the regional and local media markets,[14], it is interesting to note that in 2021 both **Jysk Fynske Medier** and **Jyllands-Posten** have announced plans to open local media in a number of towns in Jutland. As part of these plans, Jyllands-Posten is set to hire 25 new employees.[15]

In addition, a few, typically relatively new and small, purely digital local newspapers have grown in an otherwise shrinking market. These publications generated DKK 34 million revenue in 2019 based on 31 FTE.[14].

[10] See cnbc.com and cnbc.com
[11] See TV and Streaming, Report on media development in Denmark, The Ministry of Culture Denmark, 2021
[12] Kantar Gallup Viewer Survey (Broadcast, Live+VOSDAL). Data processed by The Ministry of Culture Denmark. Universe: The Danish population aged 3+
[13] See Radio and podcasting, Report on media development in Denmark, The Ministry of Culture Denmark, 2021
[14] See Media companies' revenue and employment, Report on media development in Denmark, The Ministry of Culture Denmark, 2021 and Det sander til, SDU, 2021
[15] See finans.dk and Jysk Fynske Medier

Another important change in 2021 is that B.T. will cease to publish its printed edition on Sundays. Since August, it continues as a free publication on weekdays with an expanded Saturday edition[16]. This change is one of the results of a merger between B.T. and B.T. Metro (formerly Metroxpress), the end of B.T.'s weekday single-copy sales, and the closure of mx.dk as an independent site, etc..

Furthermore, several newspaper media switched ownership. For example, Jysk Fynske Medier acquired **North Media's weeklies** and **Helsingør Dagblad** in April 2020, while in January 2020, Sjællandske Medier acquired 13 of **JP/Politikens Hus' local newspapers** in the Copenhagen Metropolitan area. Finally, Mediehusene Midtjylland (includes Herning Folkeblad) acquired an 80 % share of ownership in **Skive Folkeblad**. A small digital medium, **Kulturmonitor**, changed hands in June 2020 when JP/Politikens Hus acquired ownership. [17]

Finally, the newspaper publishing houses behind **Dansk Avis Omdeling** (DAO) and **Bladkompagniet** agreed to a merger in May 2021. The new distribution company is expected to generate about DKK 1.5 billion a year.[18]

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[16] See MediaWatch
[17] Reported by Jysk Fynske Medier, sn.dk, Herning Folkeblad and JP/Politikens Hus
[18] See Bladkompagniet

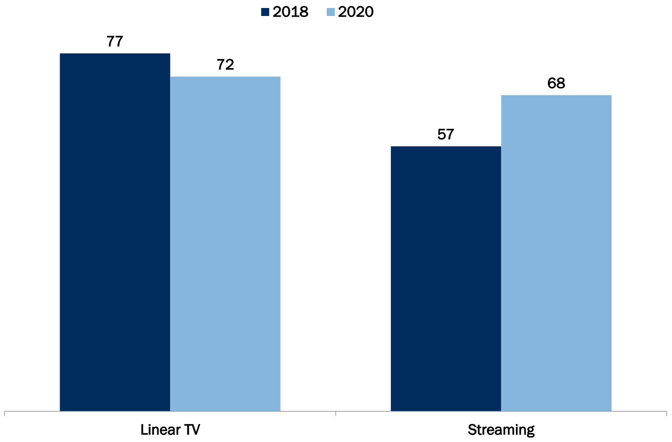
5 MAIN CONCLUSIONS ABOUT THE MEDIA YEAR

This year's 'Report on media development in Denmark" contains seven chapters describing developments in 2020. In the following, we draw selected main conclusions from the individual chapters.

5.1 TV and streaming

Streaming hard on the heels of linear viewing

Average weekly reach (%) – Linear TV and streaming



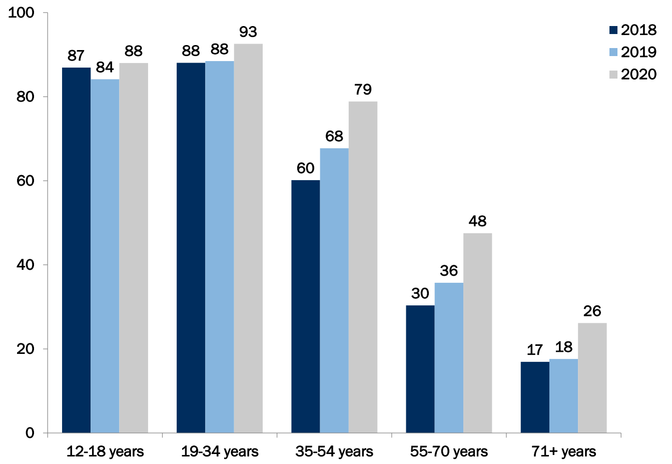
Source: Kantar Gallup Viewer Survey (live, broadcast) and Index Danmark/Gallup – Annual Data 2018 and 2020. Universe: The Danish population aged 12+. Data processed by The Ministry of Culture Denmark

- From 2018 to 2020, the share of Danes who watch linear TV every week has fallen by 5 percentage points.
- In the same period, the number of Danes who stream at least weekly has increased by 11 percentage points.
- In 2020, there is only a four-percentage-point difference between the share of Danes that watches linear TV on a weekly basis and the share of Danes that streams weekly.

The share of Danes who watch linear TV at least once a week has fallen 3 percentage points a year for the last four years, while the share of Danes who stream at least once a week has increased faster in 2020 than in previous years. If we compare the frequency of linear TV viewing with streaming, streaming is seen to narrow the gap on linear viewing.

Everyone – especially older people – is streaming more

Percentage share that streams at least once a week, 2018-2020



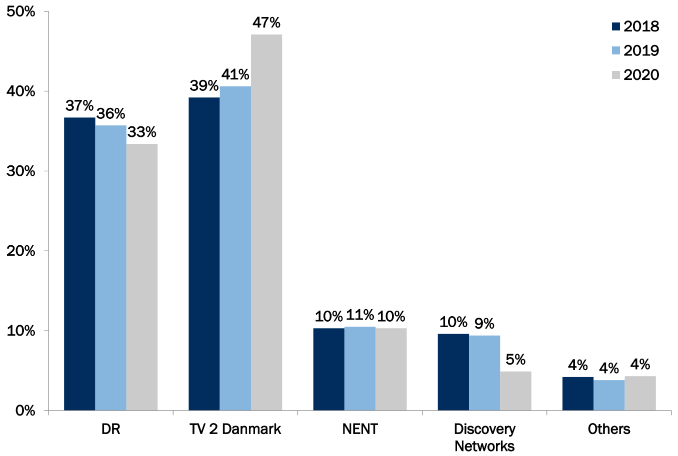
Source: Index Danmark/Gallup – Annual data 2018-2020. Universe: All households, aged 12+ Data processed by The Ministry of Culture Denmark

- In 2020, 79 % of the 35-54s stream on a weekly basis, which is an 11-percentage-point increase since 2019.
- 48 % of the 55-70s stream on a weekly basis, which is a 12-percentage-point increase since 2019.
- 26 % of the 71+s stream on a weekly basis, which is an 8-percentage-point increase since 2019.

From 2019 to 2020, the share that streams weekly increased in every age group. The largest relative increase is among the 71+s whose share increased from 17 % in 2018 to 26 % in 2020.

Shifting channel family share of viewers

TV channel families, percentage share of viewers, 2018-2020



Source: Kantar Gallup Viewer Survey. Universe: The Danish population, aged 3+ Data processed by The Ministry of Culture Denmark

- The TV 2 channel family's share of conventional TV viewing has increased to an historically high 47 %.
- Discovery Network's total share of viewers fell from 9 % in 2019 to 5 % in 2020.
- Following the closure of DR K, DR3 and DR Ultra, DR now has 33 % of total viewing.

Due to changed distribution, the Discovery channel family's share of viewers plummeted in 2020. DR's total share of viewing has also fallen because DR K, DR Ultra and DR3 ceased to function as linear channels on 2 January 2020. Lastly, NENT had 11 % of viewing in 2019 and 10 % of viewing in 2020. TV 2's channels progressed and had just less than half of the total TV viewing. The remaining channels, among them VH1 and Xee, still account for 4 % of linear viewing.

Other main conclusions regarding TV and streaming

- **YouTube, Netflix and DRTV are used most often:** The three most used services are YouTube, DRTV and Netflix. These three services are used by an almost equal share of the population on a monthly basis (55-56 % of the population), Netflix is used by most on a weekly basis (47 % of the population) and YouTube by most on a daily basis (25 % of the population). NB: Please note that these figures are about frequency, *not* time consumption. Time spent watching is apparently larger on Netflix than on DRTV and YouTube.

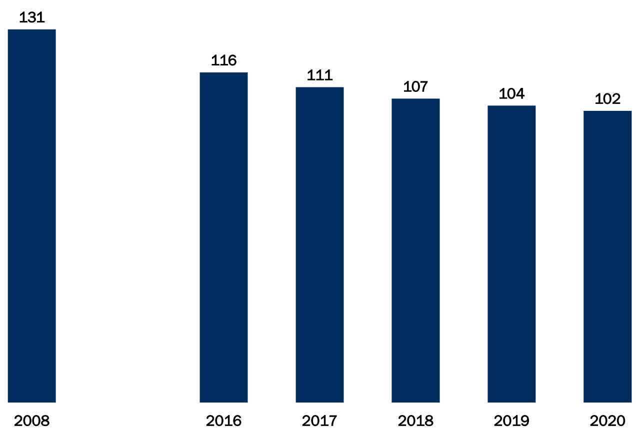
- **Fewer Danes have a TV signal retriever:** The number of households that choose not to have a TV signal retriever has increased every year since 2012. Development stagnated in 2019 but 2020 sees an increase. More than one in five households (22 %) has no TV signal retriever. The younger members of the population are still most strongly represented but the trend applies to all age groups. More than twice as many people among the 50-59s, 60-69s and 70+s has chosen to dispense with a TV signal retriever.

Read more about these developments in the TV and streaming chapter

5.2 Radio and podcasting

Daily listening time continues to fall slowly

Average daily listening time in minutes. 2008-2020



Source: Kantar Gallup Radio-Meter, aged 12+ Data processed by The Ministry of Culture Denmark

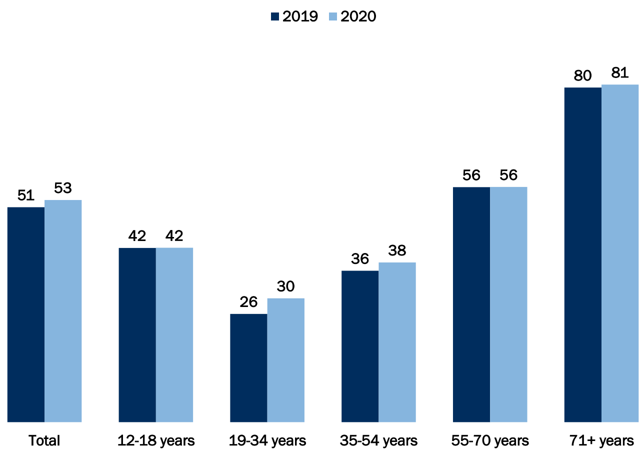
- From 2019 to 2020, daily listening time fell by two minutes from 104 minutes to 102.
- From 2016 to 2020, daily listening time fell by 14 minutes, whereas, over a longer period from 2008 to 2020, it fell by 29 minutes.

Radio listening time continues to decline. The figures for 2020 are the lowest ever recorded. However, the COVID-19 pandemic and more working from home do not seem to have accelerated development.

Since 2008, daily listening time has fallen on average by 2.4 minutes a year, and the three-minute decline from 2018 to 2019 was slightly larger than the decline from 2019 to 2020.

Slightly larger share of radio listening occurs at home

Percentage share of radio listening that occurs at home 2019-2020



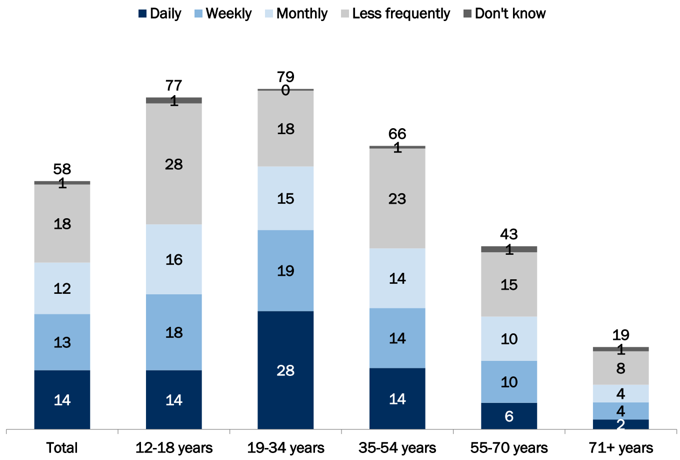
Source: Kantar Gallup Radio-Meter, aged 12+ Data processed by The Ministry of Culture Denmark

- In 2020, 53 % of radio listening occurs at home.
- In 2019, 51 % of radio listening occurred at home.

Even though the COVID-19 pandemic does not seem to have affected daily listening time, there are signs that national lockdown did bring about a slight shift in the location of radio listening. Primarily among the 19-34s and 35-54s, more radio listening takes place in the home in 2020 than in 2019, while distribution among other age groups is more or less unchanged.

Most young people listen to podcasts

"When did you last listen to a podcast?", percentage share of the population, by frequency and age. 2020



Source: Kantar Gallup Lokalradio Index half-yearly 2020. Data processed by The Ministry of Culture Denmark

- 77 % of the 12-18s and 79 % of the 19-34s listen to podcasts in 2020.
- By way of comparison, 58 % of the total population has listened to podcasts in 2020.

So far, it is primarily the younger members of the population that carry the podcast medium along. Almost four-fifths of the younger groups listen to podcasts while only about one-fifth of the 71+s do the same.

There are most high-frequency podcast listeners among the 19-34s, compared to the other age groups. 28% of the 19-34s listen to podcasts on a daily basis and 19 % do so weekly.

Other main conclusions regarding Radio and podcasting

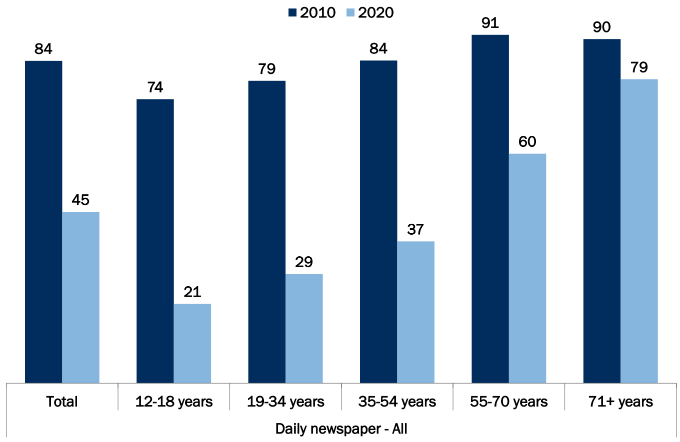
- **People with a basic school education and people who have undergone higher education boost radio listening:** From 2019 to 2020, people with a basic school education listened to the radio for four minutes more each day whereas people who have undergone higher education listened for three more minutes. Conversely, people whose most recent qualification was an upper secondary education and those with a vocational education background listened less.
- **Public service continues to gain ground:** From 2019 to 2020, the public service radio stations' share increased from 77 % to 78 %. The commercial stations' share fell correspondingly, from 23 % to 22 %. Public service radio listening continues to increase as it has since 2017.
- **More people listen to podcasts on a weekly basis:** Podcasts are gradually becoming a more important part of the Danes' daily lives. In 2020, 27 % of the population listens to podcasts at least once a week. This is a three-percentage-point increase compared to 2019, when 24 % listened to podcasts at least once a week, and 12 percentage points more than in 2017.

Read more about developments in the Radio and podcast chapter

5.3 Written news media

Daily newspapers: the gap between young and old has widened

Printed daily newspapers' average percentage reach, by age group, including Sunday editions, 2010 and 2020



Source: Index Danmark/Gallup, Annual Data 2010 and 2020, aged 12+

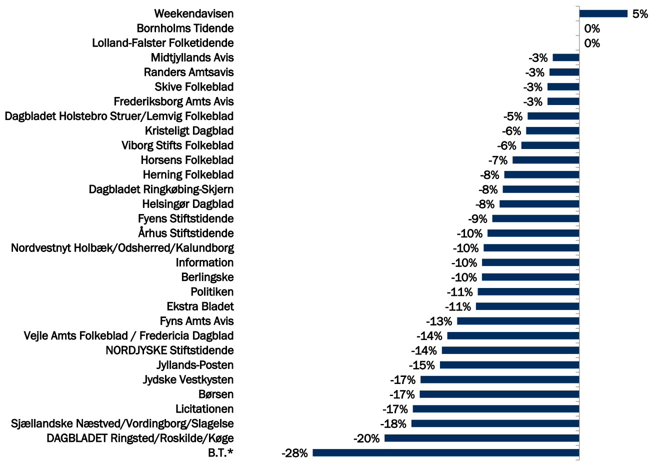
- In 2020, 21 % of 12-18s read a printed daily newspaper at least once a week. In 2010, this was 74 %.
- In 2020, 79 % of the 71+s read a printed daily newspaper every week, compared to 90 % in 2010.

In 2020, 45 % of the Danish population reads a printed daily newspaper every week, which is a fall of 39 percentage points compared to 2010. It is especially among the younger groups in the population that the share of daily newspaper readers has fallen.

These developments mean that there is a significantly wider gap between young and old readers of printed daily newspapers. In 2010, there was a 17-percentage point difference between the age groups with the lowest and highest reach. In 2020, the gap has widened to 58 percentage points.

Almost every printed daily newspaper lost readers in 2020

Change in printed daily newspapers' weekly reach (%)



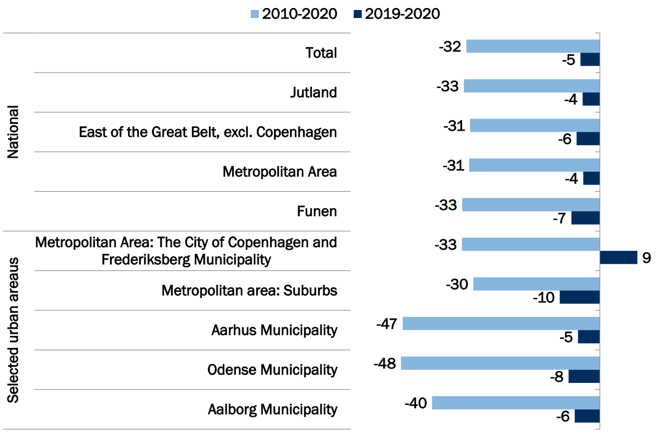
Source: Index Danmark/Gallup, Annual Data 2019-2020, aged 12+ *B.T. Is included in 2019 with five weekday editions and one Sunday edition. In 2020 B.T. Had five weekday editions, one Saturday edition and one Sunday edition.

- From 2019 to 2020, a total of 28 printed daily newspapers had fewer weekly readers.
- Of the remaining daily newspapers, two maintain their readership at status quo, while one has increased its readership.

The vast majority of printed daily newspapers has therefore fewer readers in 2020 than in 2019. Among the 28 that have fewer weekly readers, 12 have seen a readership decline of less than 10 %, whereas 16 publications have suffered a decline in excess of 10 %.

The printed local weeklies' reach has fallen significantly everywhere in Denmark

Change in printed local weeklies' weekly reach (%), 2010-2020



Source: Local Index Danmark/Gallup, Annual data 2010, 2019-2020, aged 12+.

- From 2019 to 2020, the local weekly papers' reach fell 4-10 % in different geographical areas.
- The only exceptions were the City of Copenhagen and Frederiksberg Municipality, where reach increased by 9 %.
- From 2010 to 2020, reach fell by 33 % overall.

In the decade from 2010 to 2020, the printed local newspapers' reach has fallen evenly across the country. If we look specifically at urban areas, developments have varied. Exceptions include the metropolitan municipalities, i.e. The City of Copenhagen and Frederiksberg Municipality and the Copenhagen suburbs, where reach has fallen by 33 %. Local weekly newspapers reach fell 48 % in Odense Municipality and 47 % in the City of Aarhus, whereas, in the City of Aalborg, it fell 40 % from 2010 to 2020.

Other main conclusions regarding Written news media

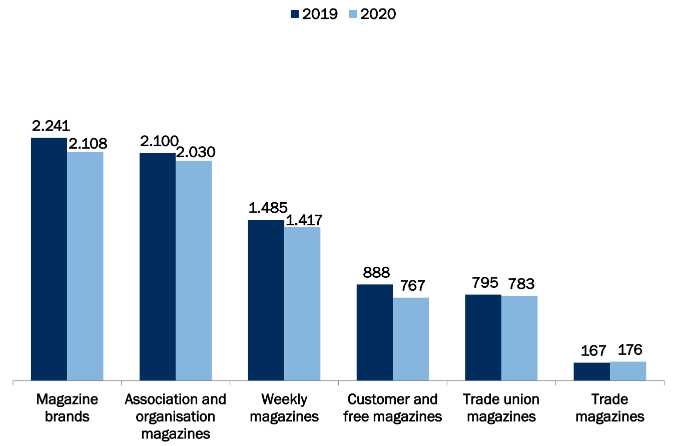
- **Almost all Danes access news every week:** In Q4 2020, 96 % of Danes aged 16+ say that they watched, read or listened to news within the past week. 55 % state that they access news several times a day and a further 25 % say they do so daily/almost daily.

Read more about these developments in the Written news media chapter

5.4 Magazines and weekly magazines

Almost all publication categories have lost readers

Average readership (1,000s) per publication, by printed publication category.



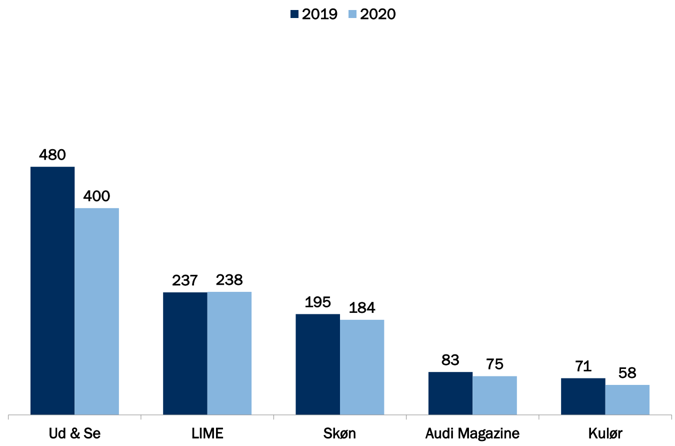
Source: Index Danmark/Gallup, Annual Data 2019 and 2020, aged 12+ Data processed by The Ministry of Culture Denmark

- Five of the six publication categories have lost readers from 2019 to 2020.
- The only exception is trade magazines that have 9,000 more readers in 2020 than in 2019.

From 2019 to 2020, magazine brands, association and organisation magazines, weekly magazines, customer and free magazines and trade union magazines lost readers, while trade magazines was the only publication category to gain readers. Development within publication categories from 2019 and 2020 contrasts to the previous period, 2018 to 2019, when most publication categories' readership increased. From 2018 to 2019, only weekly magazines and trade magazines lost readers.

Ud & Se lost most readers

Average readership (1,000s) per edition for customer and free magazines



Source: Index Danmark/Gallup, Annual Data 2019 and 2020, aged 12+ Data processed by The Ministry of Culture Denmark

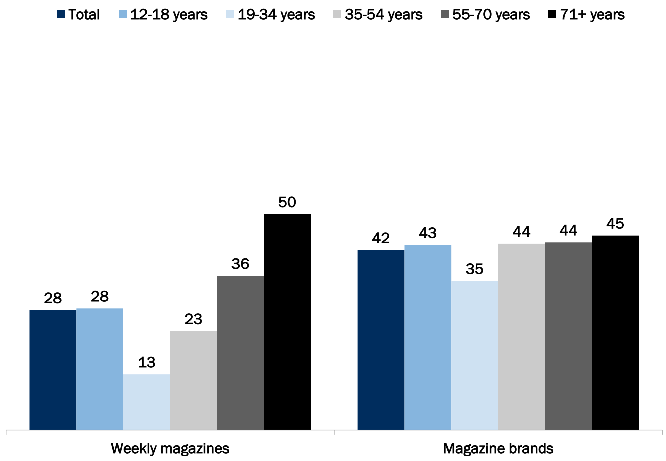
- DSB (Danish national railway company's) magazine, Ud & Se, lost 80,000 readers from 2019 to 2020.
- Ud & Se suffers the biggest readership slump of all the publications included in the survey.

Ud & Se had 80,000 fewer readers in 2020 than in 2019. Next after Ud & Se, Euroman lost 31,000 readers per edition. Part of Ud & Se's decline can presumably be ascribed to the fact that, due to the COVID-19 pandemic and restrictions, fewer Danes travelled by train in 2020. The number of journeys by national, regional and S-train (commuter) railways fell in 2020 to index 64, compared to total journeys in 2019.

Like Ud & Se, the majority of other customer and free magazines lost readers from 2019 to 2020, with the exception of LIME, Netto supermarkets' free magazine.

Half of the 71+ age group read weeklies

Percentage share, readers of weekly magazines and magazine brands (after one publication of each title in the publication category)



Source: Index Danmark/Gallup, Annual Data 2019 and 2020, aged 12+ Data processed by The Ministry of Culture Denmark

- In 2020, half of the 71+ age group reads weekly magazines.
- By way of comparison, this applies to 13 % of the 19-34s.

Where reading weekly magazines is concerned, there are relatively large divergences in share by age group. The oldest age group (71+s), of which half read weekly magazines, has by far the largest share, while the 19-34s have the lowest share: 13 %.

By way of contrast, the shares that read magazine brands are more evenly distributed across the different age groups. Shares fluctuate between 35 and 45 %. Again, the 19-34s have the lowest share, whereas the 71+s has the highest.

Other main conclusions regarding Magazines and weekly magazines

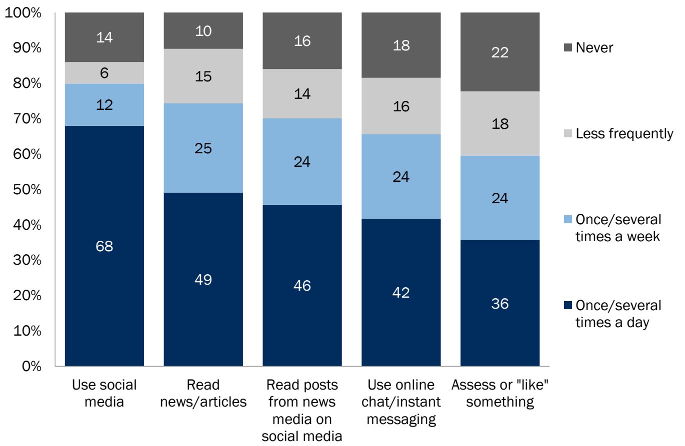
- **Comic book publications' growth stagnates:** From 2017-2019, the readership of all three comic book publications included in the survey grew. However, from 2019-2020, this development has halted. Two of the publications have lost readers while the third maintained status quo.
- **Fashion magazines have fewer readers:** From 2019-2020, the five magazine brands included in the survey, all of whom maintain editorial focus wholly or in part on fashion, lost readers. By way of contrast, readership of other magazines, such as Gør Det Selv, Goal, Hjemmets Bedste MAD and Penge & Privatøkonomi, increased in 2020.

Read more about these developments in the Magazines and Weekly magazines chapter

5.5 Internet and social media use

The Danish population uses social media significantly more frequently than they read news/articles online. However, many people read news media articles posted on social media on a daily basis.

Top Five: How often do the Danes access different types of internet content? Percentage distribution, 2020



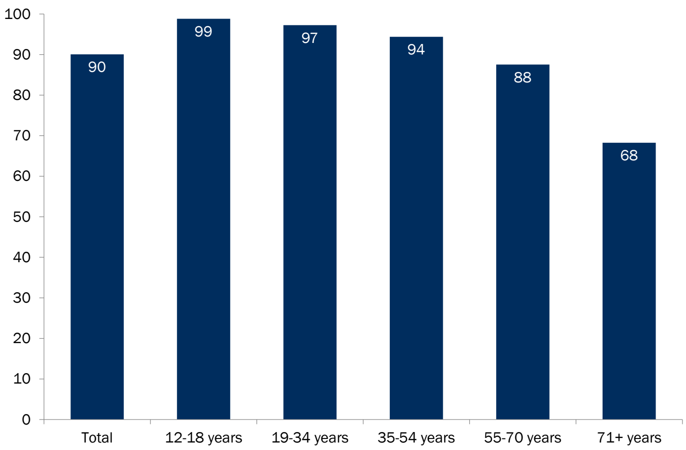
Source: Kantar Gallup/Digital Life 2019 – Content
Universe: The Danish population aged 15-75
Data processed by The Ministry of Culture Denmark

- In 2020, 68 % of the population used social media once or more times a day. 12 % used them one or more times a week.
- 49 % used the internet one or more times a day to read the news/articles, whereas a further 25 % did so one or several times a week.
- Almost the same share reads news media articles posted on social media. 46 % read these once or several times a day and 24 % once or several times a week.

42 % use online chat/instant messaging once or several times a day, whereas 36 % assess or "like" something once or several times a day. For both of these activities, 24 % engage in them once or several times a week.

Almost all Danish internet users have a profile on at least one social network. The younger the age group, the larger the share that has a profile

Percentage share of Danish internet users who have a profile on at least one social network. By age, 2020

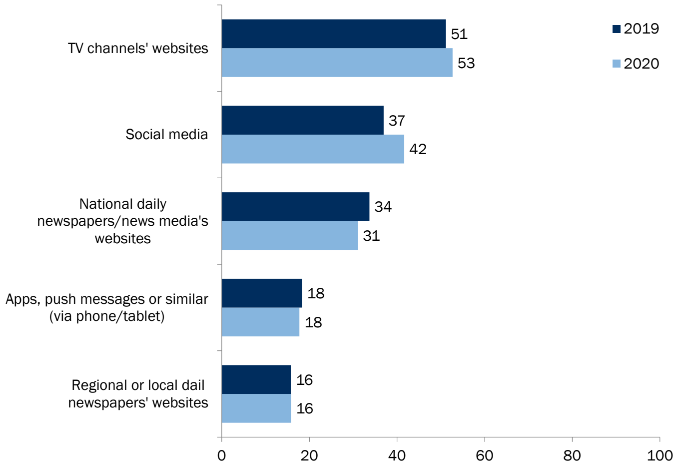


Source: Kantar Gallup / Social Media Life 2020.
Universe: The Danish population aged 12+
Data processed by The Ministry of Culture Denmark
***) Social media included in the survey: Facebook, Instagram, Jodel, LinkedIn, Messenger, Pinterest, Reddit, Snapchat, TikTok, Tinder, Twitter, WhatsApp, YouTube**

- 90 % of the population aged 12+ has a profile on at least one of the social media included in the survey*).
- The younger the age group, the larger the share that has at least one profile.
- 99 % of 12-18s has a profile on at least one social network.
- 68 % of the 71+s has a profile on at least one social network.

Social media have increasing significance as sources of news on the internet. TV channels' websites remain those named most frequently by the largest share of news users

TOP FIVE: Sources of news on the internet, percentage share of internet users who use news and name various internet sources. 2019 and 2020



Source: Kantar Gallup/Digital Life Content 2019 and 2020
Universe: Danish population aged 15-75 that uses the internet to access news at least once a month
Data processed by The Ministry of Culture Denmark

- In 2020, 53 % of people who use the internet to access news at least once a month, used the TV channels' websites as their source. This share is a slight increase from 51 % in 2019.
- 42 % of news users used social media as a news source. This share is an increase from 37 % in 2019.
- 31 % of news users use national daily newspapers/news media websites. This is a small decline from 34 % in 2019.
- 18 % used apps, push messages and similar services in 2019 and 2020.

In 2020, 16 % of respondents used regional or local daily newspapers' websites as a news source. This is unchanged since 2019.

Other main conclusions regarding internet and social media consumption

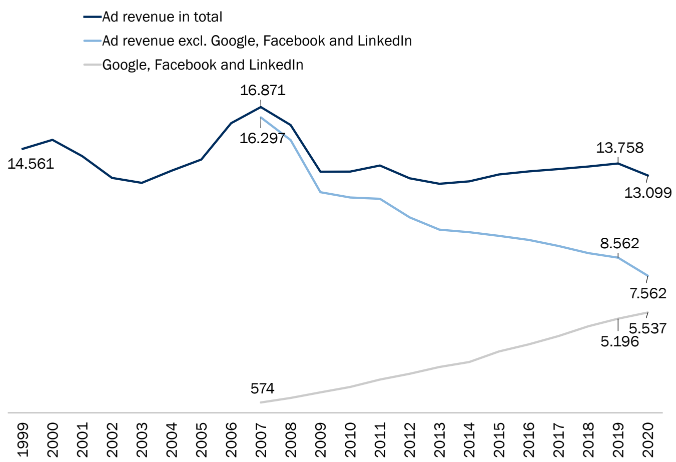
- **Broadband reach in Denmark is high – including very high download speeds:** In 2020, 95 % of Danish households have access to 100 Mbit/s, 85 % to 500 Mbit/s (download) and 86 % have access to 1000 Mbit/s broadband speeds.
- **Almost everyone who has access to internet at home uses it daily or almost daily:** In 2020, 90 % of those who have access to the internet at home, use it daily or almost daily.
- **The 15-24s spent less time using the internet on their phone in 2020, but this is still the group that spends most time on this activity.** In 2020, smartphone users aged 15-75 spent 224 minutes (3 hours and 44 minutes) a week on the internet via their phones. The older the person, the less internet consumption per week via smartphone. The 71-75s spent 72 minutes a week in 2020.
- **On average, the Danes have a profile on four social media. The 19-34s have an average of six profiles:** 15 % of this age group has a profile on 9-13 social media. 52 % of the population has a profile on 2-5 social media. The oldest age group has profiles on fewest social media. On average, 71+s have a profile on two social media, while the 55-70s have an average of three social media profiles. The youngest (12-18s) have an average of five social media profiles.
- **Nine out of 10 who have one social media profile have a Facebook profile:** 95% of Danes who use social media, have a profile on at least one social media owned by Facebook.

Read more about these developments in the Internet and social media chapter

5.6 Advertising revenue[19]

Advertising revenue dwindled in 2020 due to COVID-19 – even so, foreign players forged ahead

Advertising revenue (MDKK), adjusted for general price trends



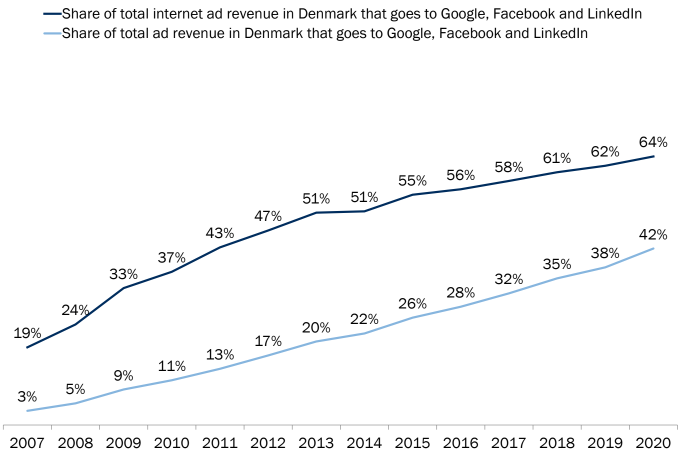
Source: Det Danske Reklamemarked 2021, advertising spending survey, IRM and Danske Medier Research for The Ministry of Culture Denmark. **Universe:** Advertising products included in Det Danske Reklamemarked 2020.

- Total advertising revenue fell in 2020 by MDKK 660. This figure corresponds to -5 % when adjusted for general price trends.
- However, the Danish players were hit hardest: Advertising revenue calculated without Google, Facebook and LinkedIn fell by MDKK 1,000 (-12 %).

Meanwhile, the three foreign players, Google, Facebook and LinkedIn, increased revenue by MDKK 341 (+7 %).

Google, Facebook and LinkedIn account for a consistently larger share of Danish advertising revenue

Share of total advertising revenue and internet advertising revenue generated by Google, Facebook and LinkedIn



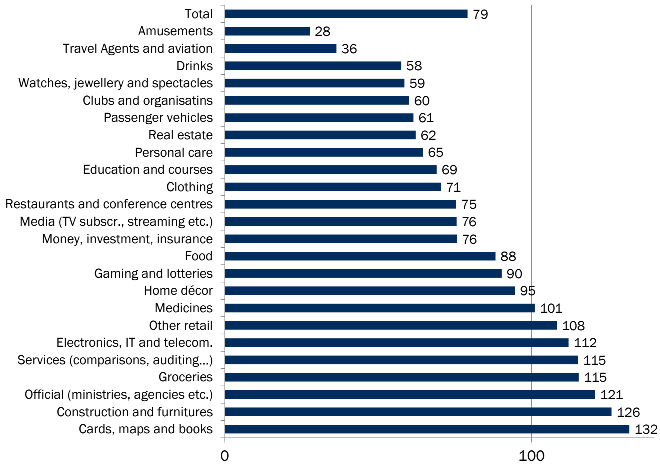
Source: Danske Medier Research for The Ministry of Culture Denmark **Universe:** Advertising products included in Det Danske Reklamemarked 2021.

- Google, Facebook and LinkedIn's share of internet advertising revenue in Denmark grew from 62 % in 2019 to 64 % in 2020.
- These three players' share of total advertising revenue grew from 38 % to 42 % (+4 percentage points).
- This means that more than 4 in 10 Danish Kroner spent on advertising now goes to Google Facebook and LinkedIn.

[19] This chapter of the report describes the Danish advertising market and covers the following media categories: TV, Local and regional weeklies, Daily newspapers, Magazines/trade magazines/journals/free publications, Posters and traffic/Outdoor, Radio, Cinema and Internet

COVID-19 hit advertising categories in very different ways

Indexed gross* advertising spending without desktop display for selected categories, March-May 2020 compared to March-May 2019



Source: Kantar Gallup Adfacts. *Based on advertising list prices before discounts of any kind and estimated net price for search.
Universe: Daily newspapers, Sunday newspapers, weekly newspapers distributed to households (although only 5-7 titles), weeklies, magazines, TV, cinema, outdoor, mobile display and search

- COVID-19 affected advertising spending in the various product categories in different ways.
- Compared to the same period in 2019, advertising spending in several advertising categories was hard hit in the lockdown period March-May 2020. Others benefited.

For example, advertising spending on Amusements (index 28), Travel Agents and air traffic (index 36) and Restaurants and conference centres (index 75) was considerably lower in the period March-May 2020 compared to the same period in the previous year. However, there was increased spending on other categories, i.e. Official (ministries, public administration, etc.) (index 121) and Maps and books (index 132).

Other main conclusions regarding Advertising revenue

- **Advertising revenue on the internet continues to grow:** In 2020, ad revenue on the internet amounts to 66 % of total ad revenue. This is a five-percentage-point increase on 2019 and an increase of 37 percentage points compared to 2010. In 2020, foreign players Google, Facebook and LinkedIn's ad revenue increased while the remainder of advertising revenue generated via the internet shrank overall.

- **Audio-visual media groups more stable than written media groups:** Ad revenue in audio-visual media groups is and has long enjoyed significantly more stable development than the printed media. From 2019 to 2020, printed media groups' ad revenue fell by MDKK 539 (= -22 %). The audio-visual media groups (these two categories are more or less equal size) lost MDKK 257 (= -10 %) of ad revenue, i.e. only about half as much.

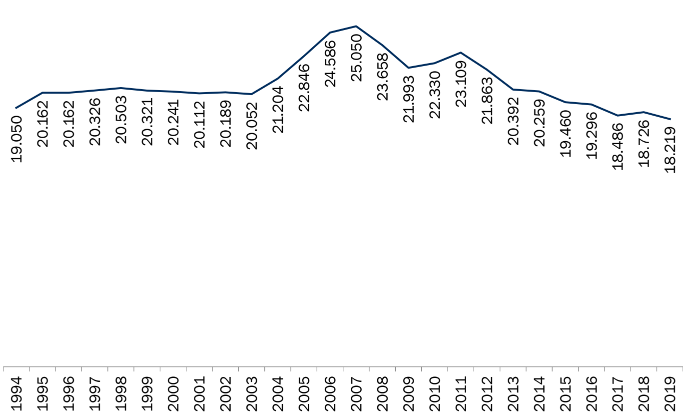
- **Web-TV advertising is growing fast:** Within a few short years, display ads on web TV have become a significant part of ad revenue. This subcategory grew by MDKK 92 in 2020 (18 %) to MDKK 602. Display advertising on web TV has therefore grown larger than e.g. advertising in daily newspapers (MDKK 504 in 2020).

Read more about developments in the Advertising revenue chapter

5.7 Media spending and prices

Households reduce media-related spending

Households' average annual media-related spending, adjusted for inflation/development in consumer prices, 1994-2019



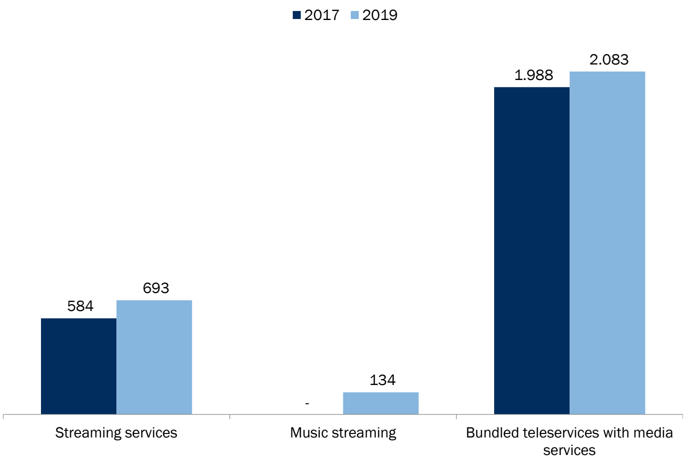
Source: Statistics Denmark – Spending Survey. Data processed by The Ministry of Culture Denmark

- Following a minor increase from 2017 to 2018, Danish households' average media-related spending fell again from 2018 to 2019. Spending fell MDKK 508 (adjusted for inflation/development in consumer prices).
- The fall from 2018 to 2019 culminates a period of generally falling media-related spending since 2011.
- In 2019, households spent DKK 4,891 less than in 2011.

If we compare households' media-related spending with total spending, there is also a downward trend. In 2019, Danish households spent on average 5.8 % of total spending on media-related items, compared to e.g. 6.6 % in 2016, 7.2 % in 2011 and 6.9 % in 1994.

Digital media products amount to a significant share of household spending

Average annual spending (DKK) on Streaming services, Music streaming and bundled teleservices including media services, adjusted for general price trends, 2017 and 2019



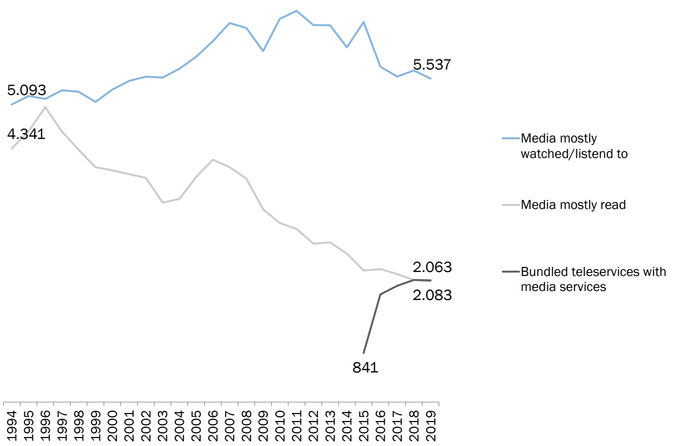
Source: Statistics Denmark – Spending Survey. Data processed by The Ministry of Culture Denmark

- In 2019, Danish households spent on average DKK 693 on streaming services, e.g. Netflix and TV 2 Play, and DKK 134 on music streaming services, e.g. Spotify.
- By way of comparison, households spent DKK 992 on newspapers and DKK 677 on books.

In addition to these, Danish households also purchase digital media products via teleservices bundled with media services, i.e. bundles typically containing combinations of e.g. telephony, internet, TV subscriptions, streaming services and music streaming services.

Spending on media primarily for reading has consistently fallen

Average annual spending (DKK) on Streaming services, Music streaming and Combined teleservices including media services, adjusted for general price trends, 2019



Source: Statistics Denmark – Spending Survey. Data processed by The Ministry of Culture Denmark

- Total household spending on written media (newspapers, books, magazines and weekly magazines) continues to fall.
- Media spending of these publications fell to DKK 2,063, less than half the 1994 level (DKK 4,341).

The media that are primarily watched and listened to have both been more stable in the longer term. However, households have shifted part of spending on these to *bundled* communication services that include media services, in particular TV subscriptions and streaming services.

Other main conclusions regarding spending

- **Lower income households spend more of their income on media-related spending:** The two groups with the lowest total income spend 7.6 % and 7.1 % respectively of total spending on media-related items. This is 2.6 and 2.1 percentage points more than the share of spending in the highest income households, i.e. over DKK 800,000 a year.

Read more about these developments in the Media spending and prices chapter

6 THIS YEAR'S SPECIAL REPORTS

In addition to the regular annual surveys, The Ministry of Culture Denmark also publishes a series of special reports and news bulletins under the auspices of the 'Report on media development in Denmark'. In the past year, the agency has published two special reports and one news bulletin.

6.1 Revenue and employment in Danish media companies

The report describes very varied developments in revenue and employment in different types of media companies. The data covers eight categories (including TV and streaming, written news and topical items media and publishing houses) and different types of ownership (e.g. foreign ownership, publicly funded, etc.). The survey covers the period 2016 -2019.

Generally speaking, media company revenue was stable from 2016 to 2019. The total figure was MDKK 30,198 in 2019, which was MDKK 202 more than in 2016. Conversely, employment has fallen by 876 FTE to 18,088 FTE in 2019. The survey also shows that a significant number of FTEs disappeared in the first half of 2020, presumably due to the COVID-19 pandemic.

Audio-visual media companies have generally enjoyed a more stable, positive development than media companies whose principal focus is on the written media. For example, revenue growth has increased in TV and streaming, TV production companies, film production companies, radio, podcasting and record companies. Conversely, revenue and employment have both fallen significantly in media companies that primarily publish written news and topical items media, magazines and weekly magazines.

The survey results also show:

- **Foreign influence:** In 2019, media companies with majority foreign influence/ownership generated MDKK 9,632, corresponding to a 32 % share of total calculated revenue in Denmark. In addition, foreign media companies that are not registered as Danish companies, including Netflix and Amazon Prime, also generate revenue in Denmark. Meanwhile, foreign tech giants, e.g. Google and Facebook, have a constantly growing share of the Danish ad market. All in all, there is significant foreign influence on the Danish media industry.

- **Digital growth:** From 2016 to 2019, the sub-branches Digital professional publications and Other digital written news and topical items have increased significantly – in terms of both revenue and FTEs. In the period 2016 to 2019, revenue increased in the largest of the three purely digital sub-branches, Digital professional publications, from MDKK 110 to 206 and FTE from 134 to 240. In the same period, revenue in a small sub-branch, Digital local newspapers, grew from MDKK 25 to MDKK 34 and FTE increased from 18 to 31.

- **Decline in regional and local media:** Revenue generated by media companies who primarily published printed news and topical items with regional and local focus fell by MDKK 624 from 2016 to 2019 (-16 %). In the same period, FTE fell by 662 (-15.8 %).

Read more in "Revenue and employment in Danish media companies"

6.2 Media credibility, fake news and fact-checking

In a report entitled "*Medietillid, fake news og faktatjek. Befolkningens tillid til medier, syn på fake news og brug af faktatjek*", The Ministry of Culture Denmark examines the Danes' news sources, their confidence in the news media and what they know about and think of the term "fake news". The report also investigates if fake news worries the Danish population and whether Danes check the facts they read and share. The report includes a general introductory chapter about fake news, the importance of trust in society and in the media, and the main results of several surveys, including one into the spread of fake news on Twitter.

Among other findings, the report includes the following:

- Almost half of the Danish population is worried that fake news prevents them from knowing what is really happening (9% strongly agree that they are worried, and 38 % agree).
- More than half of the Danes believe that there are media in Denmark that deliberately publish fake news (8 % believe that there are many, 52 % that there are just a few).
- A total of 66 % of Danes believe that the news sources they use are credible and only publish fake news by mistake (12 % strongly agree and 54 % agree). Only 20 % disagree (16 % disagree and 4 % strongly disagree).
- 93 % of the population have heard of the term “fake news”. Awareness of the term is strong in every age group. Awareness is greatest among the 30-44s, of whom 97 % have heard the term and least among the 71+s, of whom 87 % have heard it.
- Only 17 % of the population believes that elections to the Danish Parliament are unaffected by fake news. However, only 4 % believes that elections are seriously affected. A total of 66 % believe that elections are affected to some degree (24 %) or only slightly (42 %).
- Those who believe that their own choice of news sources is credible, have a wider media repertoire in the past week than those who do not believe that their news sources are credible, and these people are more likely to have used more traditional media, e.g. TV and radio.
- Among those who do not believe that their chosen news media are credible, there are more who used social media, internet pages and apps provided by foreign media as their news sources within the past week than among those who do.
- Only one in four (26 %) states that they use a fact checking tool. Men use such tools significantly more often than women. 34 % of men and 19 % of women use fact checking tools.

Read the report on media credibility, fake news and facts checks

6.3 News bulletin surveys

Under the auspices of the ‘Report on media development in Denmark’, The Ministry of Culture Denmark consistently publishes news bulletins, i.e. concise surveys of current topics. During the past year, the Ministry published one news bulletin, the results of which are presented below:

6.3.1 News bulletin: Streaming services

The *News bulletin* survey: *Streaming Services* focuses on the Danes’ access to streaming services that offer audio and audio-visual content. The survey shows that of the ten best-known streaming services, three offer audio content while the other seven offer audio-visual content. The four best-known are Netflix (known to 93 % of the Danish population), TV 2 Play (87 %) and Spotify and YouTube (both 84 %).

The survey also shows that Netflix is the streaming service most Danes have access to. 60 % have access to Netflix, while 35 % of the population has access to the second-most widespread streaming service, TV 2 Play. Next in order of access are HBO Nordic and ViaPlay, to both of which 28 % of the Danish population has access.

The survey also shows:

- On average Danes have access to three streaming services that they pay for. Moreover, Danes have had access in the past to one streaming service they paid for that they no longer have access to.

- 38 % of the entire population have access to Spotify, while 78 % of the young (15-24s) have access to this service. This is the highest share of any age group in the survey.

- 85.4 % of Spotify's users are satisfied with the service. The same applies to 85.3 % of DRTV's users and 84.7 % of Netflix users. These three services are the most popular measured on user satisfaction in the Gallup survey.

Read more in the News Bulletin survey: Streaming services

7 METHODOLOGY

To read about the methods used, read the method description in each chapter.

- TV and streaming
- Radio and podcasting
- Written news media
- Magazines and weekly magazines
- Internet and social media use
- Advertising revenue
- Media spending and prices

For detailed information about the methods used, see the 'Report on media development in Denmark 2021' website:

8 THE USE OF SURVEY DATA AND RESULTS

All rights to the data used belong to the original sources/data providers.

When using any of the data, the original source (e.g. Dansk Online Index, Statistics Denmark and Kantar Gallup) must be cited. The Ministry of Culture Denmark's 'Report on media development in Denmark 2021' must also be cited as a source.

Resale and other commercial exploitation/utilisation of data are not permitted in any shape or form.

9 LIST OF FIGURES

10 LIST OF TABLES