

Denmark

Denmark: key data

Population	5.5m
TV households	2.6m
DVD households (penetration)	89.6%
Blu-ray households (penetration)	17.2%
Distributors revenues from video software	Dmk 665.6m / € 89.5m
Comparison with 2011 (local currency)	-17.9%
DVD/ Blu-ray Disc split	€ 76m / € 13.5m
Video software rental/retail split (%)	8/92
Consumer spending on video software	Dmk 1208.4m / € 162.4m
Comparison with 2011 (local currency)	-12.2%
DVD/ Blu-ray Disc split	€ 136.9m / € 25.5m
Video software rental/retail split (%)	19/81
Consumer spending on digital video and TV VOD	Dmk 244m / € 32.8m
Comparison with 2011 (local currency)	99.1%
Digital video/TVVOD split (%)	33 / 67



DVD

- In 2012, retail DVD units shipped to trade declined by 21 per cent in volume. 13,5 million DVDs were sold on the Danish market (new-release and catalogue). Reasons for the decline were the increase of digital sales and the switch from the DVD format to the Blu-ray (BD) format. The number of digital services increased significantly in 2012. Furthermore, the recession resulted in a lower willingness to buy in all areas of retail business.
- The value of the DVDs sold continued to decrease, leaving the industry with a decline in revenues of 18 per cent. The total DVD retail market was close to DKK 522 million in 2012.
- The DVD rental market reached DKK 43 million, a decline of 33 per cent since 2011.
- Revenues from total DVD retail and rental reached DKK 565 million in 2012.
- 24 per cent of all DVDs were bought in supermarket chains.

Blu-ray

- In 2012, the turnover of Blu-ray was approximately DKK 88,6 million.
- 1,2 million Blu-ray Discs were sold on the Danish market.

- At the end of the year 2012, the sales of Blu-ray represented 18 per cent of the total DVD/Blu-ray market – an increase from 16 per cent at end 2011.
- The Blu-ray format did not achieve the expected mass-market acceptance. Penetration of this format was still very low, which could be explained by the positive developments of digital services throughout 2012.
- 27 per cent of all BDs were bought in consumer electronic stores.

Online Distribution

- More and more online services became available in 2012. At the end of 2012, Netflix, HBO and You Bio were introduced, which received a special focus in the media.

Other relevant developments

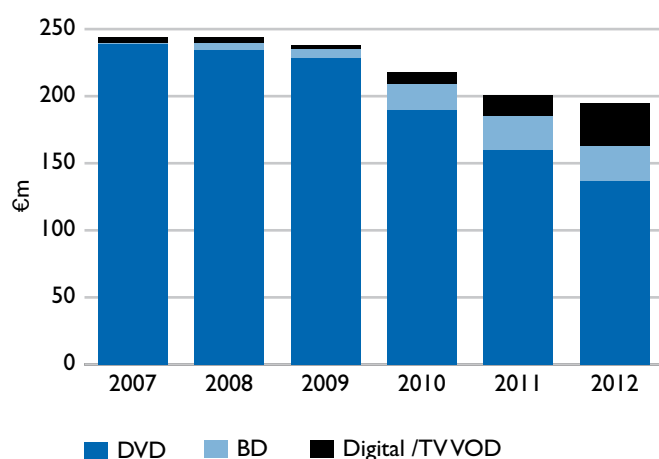
In June 2012, the Ministry of Culture launched a number of initiatives to promote legal online business for the creative industries in Denmark. The DK right holders' alliance (RettighedsAlliancen) worked with the Government before the launch of this initiative which is supported by all political parties. The RettighedsAlliancen continues to pursue the introduction of an IPR Task Force and more tangible elements of enforcement, a challenging task in the current political climate.

The Ministry of Culture's action plan contains a number of elements, including:

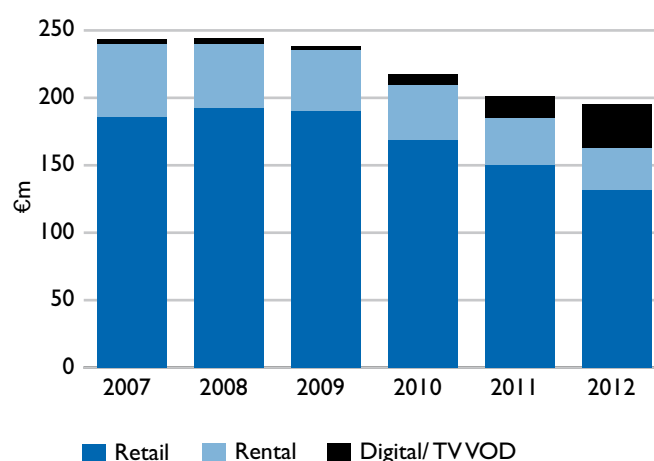
- **An Innovation Forum:** facilitate future cooperation across sectors and identify barriers for development of legal services);
- **An Information Campaign:** A joint information campaign developed and co-financed by the telecoms sector; right holders and the Ministry of Culture with emphasis on the ever-increasing options for legal access to music, films and books. See ShareWithCare.dk (English translation not yet available) - the campaign can be followed via Facebook and Twitter;
- **A Dialogue on Contractual Enforcement:** contribute to the development and application of voluntary measures by intermediaries contributing to improved enforcement of intellectual property rights;
- **Guidelines for Blocking Access to Infringing Sites:** the Danish telecoms sector and right holders have an agreed process for blocking access to infringing sites (recall the Danish Supreme Court decision on blocking access to The Pirate Bay website which was subsequently extended to ISPs not covered by the judgment). The parties are developing a written Code of Conduct on the basis of the already agreed process providing that all ISPs will block access to an infringing site upon a final decision by the competent court;
- **Improved Secure Internet Access:** efforts to increase the use of secure mobile Internet connections;
- **Evaluation and Possible Future Initiatives:** evaluation of the development of the environment for copyright content on the Internet, including legal online services, on an annual basis.

This commentary was provided by the DVA, the Danish Video Association.

Consumer spending by format



Consumer spending by sector



		2007	2008	2009	2010	2011	2012	12/11
EXCHANGE RATES								
Exchange rate: Euro =	Dkk	7.45	7.46	7.45	7.45	7.45	7.44	
Exchange rate: \$ =	Dkk	5.44	5.09	5.36	5.63	5.35	5.79	
Exchange rate: \$ =	Euro	0.73	0.68	0.72	0.75	0.72	0.78	
GENERAL								
Population	m	5.4	5.5	5.5	5.5	5.5	5.5	0.2%
Households	m	2.5	2.5	2.5	2.6	2.6	2.6	0.2%
HARDWARE								
TV households	m	2.5	2.5	2.6	2.6	2.6	2.6	0.7%
DVD sector								
DVD Video player/recorder households	m	2.203	2.266	2.316	2.357	2.340	2.329	-0.5%
Penetration of TV households	%	87.5	89.3	90.8	91.9	90.7	89.6	
DVD console households	m	0.567	0.632	0.697	0.712	0.736	0.691	-6.0%
Penetration of TV households	%	22.5	24.9	27.3	27.8	28.5	26.6	
BD sector								
BD standalone player households	m	0.0	0.013	0.063	0.162	0.305	0.446	46.3%
Penetration of TV households	%	0.0	0.5	2.5	6.3	11.8	17.2	
PS3 console households	m	0.0	0.102	0.168	0.237	0.307	0.370	20.7%
Penetration of TV households	%	1.7	4.0	6.6	9.2	11.9	14.3	

Total video software market

		2007	2008	2009	2010	2011	2012	12/11
CONSUMER LEVEL ALL VIDEO								
<i>Total market figures include spending on both physical and digital video</i>								
Total spending on all video	Dmk m	1,814.2	1,820.4	1,774.6	1,621.2	1,498.3	1,452.4	-3.1%
Total spending on all video	Euro m	243.5	244.1	238.3	217.7	201.1	195.2	-2.9%

Video market: Denmark

		2007	2008	2009	2010	2011	2012	12/11
TRADE LEVEL PHYSICAL VIDEO								
<i>Total market figures include revenues from legacy formats not broken out separately (eg,VHS, HD-DVD, UMD) where relevant.</i>								
Total revenues from video software	Dmk m	1,118.5	1,089.1	1,013.2	846.4	810.6	665.6	-17.9%
Total revenues from video software	Euro m	150.1	146.1	136.1	113.6	108.8	89.5	-17.8%
Total revenues from retail video	Dmk m	972.0	953.9	904.6	748.5	732.9	610.8	-16.7%
Total revenues from retail video	Euro m	130.4	127.9	121.5	100.5	98.4	82.1	-16.5%
Total revenues from rental video	Dmk m	146.5	135.2	108.6	97.9	77.7	54.7	-29.5%
Total revenues from rental video	Euro m	19.7	18.1	14.6	13.1	10.4	7.4	-29.4%

		2007	2008	2009	2010	2011	2012	12/11
CONSUMER LEVEL PHYSICAL VIDEO								
<i>Total market figures include spending on legacy formats not broken out separately (eg,VHS, HD-DVD, UMD) where relevant.</i>								
Total spending on video software	Dmk m	1,785.4	1,786.7	1,749.8	1,558.4	1,375.8	1,208.4	-12.2%
Total spending on video software	Euro m	239.6	239.6	235.0	209.2	184.6	162.4	-12.0%
Total spending on retail video	Dmk m	1,382.9	1,435.2	1,418.0	1,254.5	1,116.7	979.4	-12.3%
Total spending on retail video	Euro m	185.6	192.5	190.4	168.4	149.9	131.6	-12.2%
Total spending on rental video	Dmk m	402.6	351.5	331.7	303.9	259.1	229.1	-11.6%
Total spending on rental video	Euro m	54.0	47.1	44.5	40.8	34.8	30.8	-11.5%

		2007	2008	2009	2010	2011	2012	12/11
CONSUMER LEVEL DIGITAL VIDEO								
<i>The purchase or rental of movies and TV series delivered over the open internet through transactional models (also known as EST, DTO, Internet VOD) or on a subscription basis.</i>								
Total spending on digital video	Dmk m	3.1	5.3	5.8	9.2	20.7	81.0	291.1%
Total spending on digital video	Euro m	0.4	0.7	0.8	1.2	2.8	10.9	291.7%

		2007	2008	2009	2010	2011	2012	12/11
CONSUMER LEVEL TV VOD								
<i>The delivery of movies and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services.</i>								
Total spending on TVVOD	Dmk m	25.6	28.4	19.0	53.6	101.8	163.0	60.1%
Total spending on TVVOD	Euro m	3.4	3.8	2.6	7.2	13.7	21.9	60.3%

Retail video market

		2007	2008	2009	2010	2011	2012	12/11
Outlets stocking retail video	no.	2,100	2,100	1,900	1,710	1,600		
Retail chains with 10 or more outlets	no.	19	19	17	15	13		
Kiosks stocking retail video	no.	1,000	1,000	1,000	900	900		

Trade level: DVD retail

Revenues from retail DVD	Dkk m	962.7	925.2	850.8	647.1	639.2	522.2	-18.3%
Revenues from retail DVD	Euro m	129.2	124.1	114.3	86.9	85.8	70.2	-18.2%
Retail DVD units shipped to trade	m	21.6	22.6	24.4	19.3	17.1	13.5	-20.9%
Average trade price	Dkk	44.50	40.94	34.84	33.60	37.40	38.63	3.3%
Average trade price	Euro	5.97	5.49	4.68	4.51	5.02	5.19	3.4%
Number of titles released	no.	1,388	1,290	1,388	1,388	1,300		

Trade level: BD retail

Revenues from retail BD	Dkk m	7.8	28.7	53.8	101.3	93.7	88.6	-5.5%
Revenues from retail BD	Euro m	1.0	3.8	7.2	13.6	12.6	11.9	-5.4%
Retail BD units shipped to trade	m	0.1	0.24	0.56	1.14	1.17	1.17	-0.2%
Average trade price	Dkk	138.69	121.77	96.45	89.09	79.86	75.61	-5.3%
Average trade price	Euro	18.61	16.33	12.95	11.96	10.72	10.16	-5.2%

Retail video market

		2007	2008	2009	2010	2011	2012	12/11
Consumer level: DVD retail								
Spending on retail DVD	Dmk m	1,375.1	1,400.1	1,380.1	1,139.8	978.6	850.9	-13.1%
Spending on retail DVD	Euro m	184.6	187.8	185.3	153.0	131.3	114.4	-12.9%
Retail DVD sold to consumers	m	18.3	20.0	14.6	13.8	11.7	10.3	-11.9%
Average consumer price	Dmk	75.12	69.99	94.35	82.64	83.92	82.79	-1.4%
Average consumer price	Euro	10.08	9.39	12.67	11.10	11.26	11.13	-1.2%
Consumer level: BD retail								
Spending on retail BD	Dmk m	7.6	35.0	37.9	114.7	138.1	128.5	-6.9%
Spending on retail BD	Euro m	1.0	4.7	5.1	15.4	18.5	17.3	-6.8%
Retail BD sold to consumers	m	0.0	0.18	0.22	0.72	0.92	0.96	3.9%
Average consumer price	Dmk	339.93	200.00	175.16	159.97	149.50	133.90	-10.4%
Average consumer price	Euro	45.62	26.82	23.52	21.48	20.06	18.00	-10.3%

Rental video market

		2007	2008	2009	2010	2011	2012	12/11
<i>Rental video market data includes both store-based rental and physical rent-by-mail operations where relevant.</i>								
Trade level: DVD rental								
Revenues from rental DVD	Dmk m	146.3	131.6	101.9	88.7	64.4	43.1	-33.1%
Revenues from rental DVD	Euro m	19.6	17.6	13.7	11.9	8.6	5.8	-33.0%
Rental DVD units shipped to trade	m	1.13	1.02	0.95	0.83	0.64	0.43	-33.1%
Average trade price	Dmk	129.52	129.01	107.30	106.88	100.61	100.61	0.0%
Average trade price	Euro	17.38	17.30	14.41	14.35	13.50	13.52	0.2%
Number of titles released	no	606	619	558	558	500		
Trade level: BD rental								
Revenues from rental BD	Dmk m	0	3.643	6.639	9.2	13.3	11.7	-12.1%
Revenues from rental BD	Euro m	0.03	0.489	0.891	1.2	1.8	1.6	-11.9%
Rental BD units shipped to trade	m	0	0.025	0.054	0.1	0.1	0.1	-12.1%
Average trade price	Dmk	145	144	122	122	116	116	
Average trade price	Euro	19.39	19.31	16.42	16.36	15.52	15.54	0.2%
Number of titles released	no	160	280	498	498	425		
Consumer level: DVD rental								
Spending on DVD rental	Dmk m	402.6	349.9	319.1	271.1	211.1	167.6	-20.6%
Spending on DVD rental	Euro m	54.0	46.9	42.9	36.4	28.3	22.5	-20.5%
DVD rental transactions	m	11.7	10.2	9.5	8.2	6.5	5.1	-21.3%
Average rental price	Dmk	34.32	34.31	33.45	33.06	32.48	32.77	0.9%
Average rental price	Euro	4.61	4.60	4.49	4.44	4.36	4.40	1.1%
Consumer level: BD rental								
Spending on BD rental	Dmk m		1.56	12.6	32.8	48.0	61.4	28.1%
Spending on BD rental	Euro m		0.21	1.7	4.4	6.4	8.3	28.2%
BD rental transactions	m		0.05	0.377	0.993	1.477	1.874	26.9%
Average rental price	Dmk		4.60	4.50	4.44	4.36	4.40	1.1%
Average rental price	Euro		4.60	4.50	4.44	4.36	4.40	1.1%

Combined DVD & Blu-ray Disc retail top 10

Rank	Title	Distributor
1	Hvidsten Gruppen	Walt Disney
2	En Kongelig Affære	Nordisk Film
3	Twilight Saga - Breaking Dawn Del I	Nordisk Film
4	Klassefesten	Nordisk Film
5	Tintin : Enhjørningens Hemmelighed	Sony Pictures
6	The Avengers	Walt Disney
7	Ice Age 4 - På Gyngende Grund	Twentieth Century Fox/ SF Film
8	The Hunger Games (Dødsspillet)	Nordisk Film
9	Varm Luft I Canal Grande	Universal Music
10	Spas	Artpeople

Source: Danish Video Association (DVA)

Notes: 1. Ranking based on retail sales by volume

2. Units sold based on available data

The most important online services

	S-vod	T-vod	EST
www.Film2home.dk		X	X
www.Sfanytime.com		X	
www.Sputnik.tv2.dk	X		
www.voddl.com	X		
http://viaplay.dk/ (Viasat)	X	X	
www.moveebox.dk		X	
www.headweb.com		X	
www.fullrate.dk		X	
www.yousee.dk (You Bio)	X	X	
www.fasttv.dk (TDC Home Trio)	X	X	
www.wao.dk		X	
www.seas-nve.dk		X	
www.stofa.dk		X	
www.telia.dk		X	
www.cdon.dk		X	
www.canaldigital.dk		X	
www.altibox.dk		X	
www.netflix.dk	X		
www.itunes.dk		X	X
www.hbonordic.com	X		

Source: Danish Video Association (DVA)