

Denmark

Denmark: key data

Population	5.5m
TV households	2.6m
DVD Video player/recorder penetration	77.0%
Blu-ray Disc player/recorders penetration	23.5%
Consumer spending on physical video software	Dkk 1bn / € 128.5m
Comparison with 2012 (local currency)	-20.7%
DVD/ Blu-ray Disc split	€ 105.2m / € 23.3m
Video software rental/retail split (%)	21 / 79
Consumer spending on digital video and TV VOD	Dkk 407.5m / € 54.6m
Comparison with 2012 (local currency)	146.6%
TVVOD/ Digital video split (%)	23 / 77



DVD and Blu-ray market

DVD

- In 2013, DVD units shipped to consumers declined by 25 per cent in volume. 7,8 million DVDs were sold on the Danish market (new-release and catalogue). The 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 and consumer acceptance of online distribution increased significantly in 2013.
In addition, there has been a reduction in the shelf space allocated to DVD and BD in retail outlets, including supermarkets. Catalogue titles have suffered the most, while recent releases are still performing well.
- The value of DVDs sold to consumers continued to decrease, leaving the industry with a decline in revenues of 24 per cent. The total DVD consumer market closed at DKK 648 million in 2013.
- The turnover of the DVD rental market reached DKK 27 million, a decline of 35 per cent since 2012.

- 51 per cent of all DVDs were bought in supermarket chains.

Blu-ray

- In 2013, the turnover of Blu-ray was approximately DKK 109 million in consumer prices – a decline of 15 per cent.
- Approximately 895.000 Blu-ray Discs (BD) were sold on the Danish home entertainment market – a decline of 7 per cent.
- At the end of the year 2013, the sales of Blu-ray represented 18 per cent of the total DVD/Blu-ray market.
- The Blu-ray format did not achieve the expected mass-market acceptance. Penetration of this format is still very low, which is partly due to the positive developments of digital services throughout 2012 and 2013. Both, volume and value declined for the first time since the introduction of BD. Average consumer prices also dropped significantly.
- The turnover of the BD rental market reached DKK 9 million, a decline of 20 per cent since 2012.
- 31 per cent of all BDs were bought in consumer electronic stores.

Online distribution

- Multiple new online services became available in 2013.
- Consumer research showed, that by the end of 2013 the physical market accounted for approximately 70 per cent of the total market and the digital market (S-VOD, T-VOD and EST) accounted for approximately 30 per cent (in 2012 the digital market accounted for 19 per cent of sales).
- The largest players on the market are DR.nu, Netflix, Viaplay, TV2 Play, YouBio (TDC), HBO.
- Every fourth house hold in Denmark has a subscription service.

Other relevant developments

As a member of RettighedsAlliancen (the Danish coalition of right holders representing the music, film, literature, art and design industries), the Danish Video Association took part in advocacy efforts in favour of an IPR dedicated police force and other related initiatives to improve criminal enforcement.

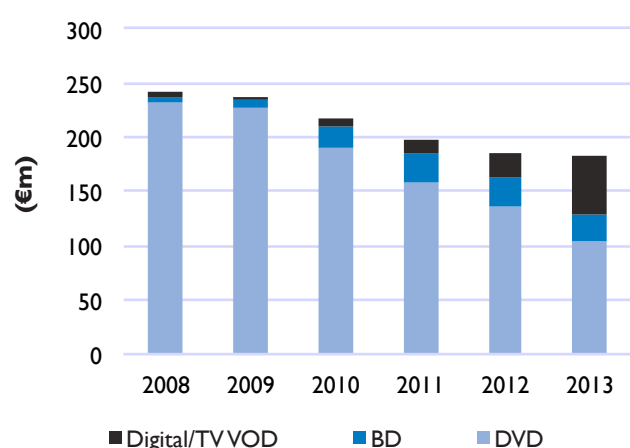
In addition, court-sanctioned blocking of infringing websites has been supplemented by an innovative, user-targeted public awareness initiative, Share With Care, based on a joint communication platform with the ISPs and the Danish Ministry of Culture. Besides a proven positive impact on consumer behavior, the Share With Care initiative has been a platform for valuable cooperation between ISPs, public authorities and rights holders, as well as for the collection of data and knowledge about consumer behavior.

A referral to Share with Care is now available on all blocked websites and as a result, 70 pct. of visitors to the campaign website, www.sharewithcare.dk, (total approx 150,000) originate from blocked websites.

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

Video market: Denmark

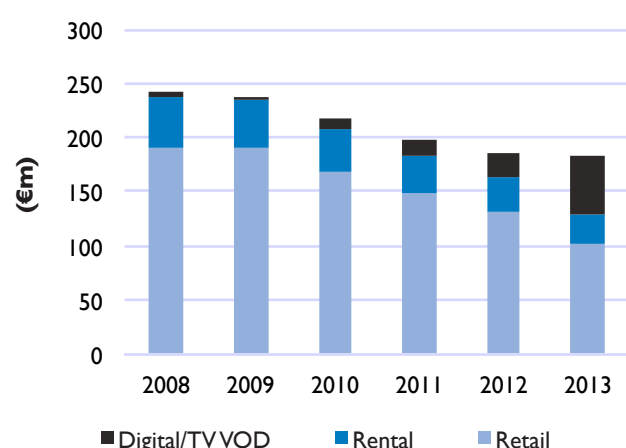
Consumer spending by format



Source: Danish Video Association (DVA)

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Consumer spending by sector



Source: Danish Video Association

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		2008	2009	2010	2011	2012	2013	12/13
EXCHANGE RATES								
Exchange rate: Euro =	Dkk	7.50	7.48	7.46	7.46	7.44	7.46	
Exchange rate: \$ =	Dkk	5.10	5.36	5.62	5.36	5.79	5.62	
Exchange rate: \$ =	Euro	0.68	0.72	0.75	0.72	0.78	0.75	
GENERAL								
Population	m	5.5	5.5	5.5	5.5	5.5	5.5	0.1%
Households	m	2.5	2.5	2.6	2.6	2.6	2.6	0.2%
HARDWARE								
TV households	m	2.5	2.6	2.6	2.6	2.6	2.6	0.4%
DVD sector								
DVD Video player/recorder households	m	2.3	2.3	2.4	2.4	2.1	2.0	-4.3%
Penetration of TV households	%	89.3	90.8	92.4	91.3	80.9	77.0	-4.7%
DVD console households	m	0.6	0.7	0.7	0.7	0.7	0.6	-16.0%
Penetration of TV households	%	24.9	27.3	27.8	28.5	26.6	22.3	-16.4%
BD sector								
BD standalone player households	m	0.013	0.063	0.162	0.305	0.461	0.614	33.2%
Penetration of TV households	%	0.5	2.5	6.3	11.8	17.7	23.5	32.6%
PS3 console households	m	0.102	0.168	0.237	0.307	0.370	0.446	20.3%
Penetration of TV households	%	4.0	6.6	9.2	11.9	14.3	17.1	19.8%

Total video software market

		2008	2009	2010	2011	2012	2013	12/13
CONSUMER LEVEL ALL VIDEO								
<i>Total market figures include spending on both physical and digital video</i>								
Total spending on video	Dkk m	1,819.9	1,772.2	1,617.4	1,467.9	1,373.9	1,366.1	-0.6%
Total spending on video	Euro m	242.7	237.0	216.9	196.7	184.6	183.1	-0.8%

Video market: Denmark

		2008	2009	2010	2011	2012	2013	12/13
CONSUMER 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 spending on video software	Dkk m	1,786.7	1,749.8	1,558.4	1,375.8	1,208.6	958.5	-20.7%
Total spending on video software	Euro m	238.3	234.0	209.0	184.4	162.4	128.5	-20.9%
Total spending on retail video	Dkk m	1,435.2	1,418.0	1,254.5	1,116.7	979.6	758.0	-22.6%
Total spending on retail video	Euro m	191.4	189.6	168.3	149.7	131.6	101.6	-22.8%
Total spending on rental video	Dkk m	351.5	331.7	303.9	259.1	229.1	200.6	-12.4%
Total spending on rental video	Euro m	46.9	44.4	40.8	34.7	30.8	26.9	-12.6%

		2008	2009	2010	2011	2012	2013	12/13
<i>Owing to a definitional change, digital video and TVVOD numbers may differ from those published in the 2012 IVF Yearbook.</i>								
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	Dkk m	5.3	5.8	9.2	20.7	81.0	313.0	286.3%
Total spending on digital video	Euro m	0.7	0.8	1.2	2.8	10.9	42.0	285.4%

		2008	2009	2010	2011	2012	2013	12/13
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	Dkk m	27.9	16.6	49.8	71.5	84.2	94.6	12.3%
Total spending on TVVOD	Euro m	3.7	2.2	6.7	9.6	11.3	12.7	12.0%

Retail video market

		2008	2009	2010	2011	2012	2013	12/13
Outlets stocking retail video	no.	2,100	1,900	1,710	1,600			
Retail chains with 10 or more outlets	no.	19	17	15	13			
Kiosks stocking retail video	no.	1,000	1,000	900	900			

Consumer level: DVD retail

Spending on retail DVD	Dkk m	1,400.1	1,380.1	1,139.8	978.6	851.1	648.6	-23.8%
Spending on retail DVD	Euro m	186.7	184.6	152.9	131.2	114.3	86.9	-24.0%
Retail DVDs sold to consumers	m	20.0	19.3	16.5	11.7	10.3	7.8	-24.5%
Average consumer price	Dkk	69.99	71.64	69.12	83.92	82.79	83.58	1.0%
Average consumer price	Euro	9.33	9.58	9.27	11.25	11.12	11.21	0.7%

Consumer level: BD retail

Spending on retail BD	Dkk m	35.0	37.9	114.7	138.1	128.5	109.4	-14.9%
Spending on retail BD	Euro m	4.7	5.1	15.4	18.5	17.3	14.7	-15.1%
Retail BDs sold to consumers	m	0.2	0.2	0.7	0.9	1.0	0.9	-6.9%
Average consumer price	Dkk	200.00	175.16	159.97	149.50	133.90	122.36	-8.6%
Average consumer price	Euro	26.67	23.43	21.46	20.04	17.99	16.40	-8.8%

Rental video market

		2008	2009	2010	2011	2012	2013	12/13
<i>Rental video market data includes both store-based rental and physical rent-by-mail operations where relevant.</i>								
Video rental outlets	no.	1,645	1,880	1,780	1,700	1,650		
Rental chains with 10 or more outlets	no.	1	1	1	1	1		
Consumer level: DVD rental								
Spending on DVD rental	Dkk m	349.9	319.1	271.1	211.1	167.6	136.4	-18.6%
Spending on DVD rental	Euro m	46.7	42.7	36.4	28.3	22.5	18.3	-18.8%
DVD rental transactions	m	10.2	9.5	8.2	6.5	5.1	4.1	-20.7%
Average rental price	Dkk	34.31	33.45	33.06	32.48	32.77	33.63	2.6%
Average rental price	Euro	4.58	4.47	4.43	4.35	4.40	4.51	2.4%
Consumer level: BD rental								
Spending on BD rental	Dkk m	1.56	12.62	32.81	47.97	61.43	64.16	4.4%
Spending on BD rental	Euro m	0.21	1.69	4.40	6.43	8.25	8.60	4.2%
BD rental transactions	m	0.05	0.38	0.99	1.48	1.87	1.94	3.3%
Average rental price	Dkk	34.31	33.50	33.06	32.48	32.77	33.15	1.1%
Average rental price	Euro	4.58	4.48	4.43	4.35	4.40	4.44	0.9%

Source: Danish Video Association (DVA)

Population and household figures: IHS Global Insight

Note: Distributor level excludes and consumer level includes VAT/sales tax.

Top 10 retail DVD titles

Rank	Title	Studio
1	De Urørlige	Scanbox
2	Skyfall	SF Film
3	Den Skaldede Frisør	Nordisk Film
4	Anders Matthesen: Anders	Art People
5	Far Til Fire Til Søs	Scanbox
6	Twilight Saga: Breaking Dawn Del 2	Nordisk Film
7	Hobbiten: En Uventet Rejse	SF Film
8	En Kongelig Affære	Nordisk Film
9	Jagten	Nordisk Film
10	Min Søsters Børn I Afrika	SF Film

Source: Danish Video Association (DVA)

Notes: 1. Ranking based on retail sales by volume

2. Units sold based on available data

Top 10 retail Blu-ray Disc titles

Rank	Title	Studio
1	Hobbiten: En Uventet Rejse	SF Film
2	Skyfall	SF Film
3	Iron Man 3	Walt Disney Studios Home Entertainment
4	The Fast And The Furious 6	Universal-Sony
5	De Urørlige	Scanbox
6	Man Of Steel	Warner Home Video
7	Django Unchained	Universal-Sony
8	Life Of Pie	Fox-Paramount
9	Avatar	Fox-Paramount
10	Twilight Saga: Breaking Dawn Del 2	Nordisk Film

Source: Danish Video Association (DVA)

Notes: 1. Ranking based on retail sales by volume

2. Units sold based on available data