Sweden

Sweden: key data 2023

Population (m)	10.3
TV households (m)	4.8
Consumer spending on total video (€m)	1,444.4
Comparison with 2022	14.7%
Consumer spending on digital video and TV VoD (€m)	1,433.6
Comparison with 2022	15.1%
Consumer spending on physical video software (€m)	10.8
Comparison with 2022	-26.2%

Consumer spending on total video (€m) - Total Europe	26,435.1
Comparison with 2022	12.1%
Consumer spending on digital video and TV VoD (€m) - Total Europe	25,419.9
Comparison with 2022	13.4%
Consumer spending on physical video software (€m) - Total Europe	1,015.2
Comparison with 2022	-12.9%

Sweden key commentary

Sweden 2023

In 2023, the overall Swedish video market experienced growth in total consumer spending compared to 2022.

Online Distribution

In 2023, the Swedish online video distribution market continued to perform well: while SVOD plays an important role, TVOD is also growing steadily with excellent growth potential. The new-release slate is back to normal and the premium content models such as Premium video-on-demand (PVOD) and Premium Electronic Sell-Through (PEST), are continuing to grow and a steady shift towards consumer interest in permanent access models (EST) is expected.

The spending on catalogue titles is stable, whereas new releases are still boosting the market for home entertainment offerings in Sweden, illustrated by the growth in the online market and forecast of continued growth both in terms of value and volume. At this stage, it is too early to say whether the recent US strikes will have a prolonged negative effect on the box office slate for 2024-2025 and even beyond.

Physical Market

In 2023, the development of the physical market in Sweden was reassuring compared to 2022, with a softened year-over-year decline. The physical format remains relevant in the Swedish home entertainment market. The 4K Ultra HD format is doing well with continued growing numbers of sales of this format. Consumer engagement in collectors' titles and premium content on 4K Ultra HD format is increasing. The catalogue segment shows potential and consumer interest in new releases on the 4K format is growing.

Other Relevant Developments

Consumer awareness of legal online services is supported and enhanced through the Swedish StreamLegal initiative (https://www.streamalagligt.se/na/) which is managed by the Swedish Intellectual Property Office and included in the EU-level AGORATEKA, managed by the EUIPO.

According to the 2024 edition of the study by Mediavision on illegal streaming and downloading in the Nordic territories, Sweden continues to face high rates of piracy. The Swedish illegal market has increased from 25 % to 28 % compared to 2023. This issue is particularly prevalent among younger age groups, with 60% of individuals aged 15-24 admitting to use pirated content. Furthermore, the number of households using illegal IPTV in Sweden has increased by 18 %, and according to Mediavision 580 000 Swedish households pay for illegal IPTV services.

Several campaigns have been launched to raise awareness about piracy including “The IP game” a campaign launched by Finnish authorities targeting younger audiences and Nordic Content Protection’s (NCP) anti-piracy campaign in Sweden entitled “Illegal TV services, a lower cost at a high price”.

A positive note is that during 2024, Swedish courts have issued several convictions against individuals running illegal IPTV services condemning them to pay criminal fines and high damages to right holders.

The Swedish government has appointed a film policy inquiry to review the current situation in the film sector in Sweden. It has recently presented an initial analysis focusing on four areas: the audience, the film industry, public initiatives, and film heritage. Key findings include a significant rise in average media consumption, with stable movie viewing rates but no growth. A major issue highlighted is the high rate of illegal film viewing. Investments in Swedish contents have decreased and cinema admission numbers have declined, though Swedish films and drama series perform well in other viewing windows. The final conclusions of the inquiry will be presented in February 2025.

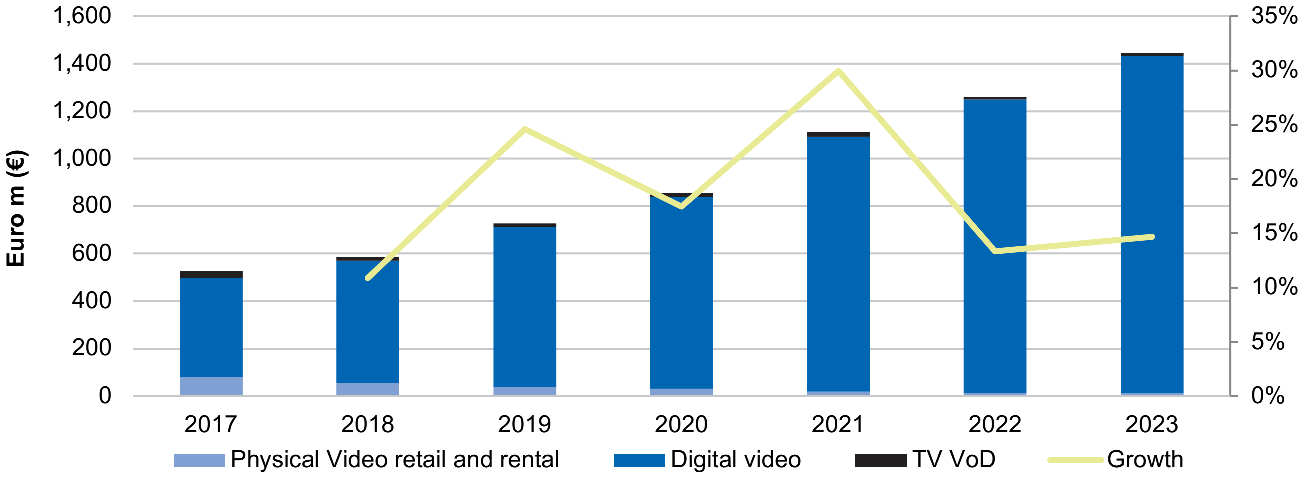
This commentary was provided by home entertainment right holders in the Swedish market.

Video market: Sweden

	2017	2018	2019	2020	2021	2022	2023	22/23
GENERAL								
Population (m)	9.9	10.0	10.0	10.1	10.2	10.2	10.3	0.6%
TV households (m)	4.5	4.6	4.6	4.7	4.7	4.7	4.8	0.6%
Population Total Europe (m)	632.8	634.4	635.7	636.7	637.3	637.7	637.8	0.0%
TV households Total Europe (m)	262.1	263.8	265.7	267.6	269.2	270.7	272.2	0.5%
Broadband households (m)	3.5	3.6	3.7	3.8	3.8	3.9	4.0	2.4%
Nominal GDP (EUR m)	480.1	470.9	474.9	469.6	495.7	514.7	530.1	3.0%
Consumer price index (100 in 2010)	101.4	101.7	95.1	97.5	102.5	105.3	111.4	5.9%
Exchange rate EUR/SEK (SEK)	9.65	10.26	10.59	10.52	*10.14*	10.65	11.47	7.7%
DVD Video player/recorder penetration (%)	77.1	74.3	72.1	70.0	67.8	65.7	63.6	-3.1%
Blu-ray Disc player/recorders penetration (%)	20.3	19.6	18.8	18.1	17.7	17.3	16.9	-2.6%
DVD Video player/recorder Total Europe (%)	64.4	61.7	59.2	56.9	54.7	52.7	50.8	-3.6%
Blu-ray Disc player/recorders penetration Total Europe (%)	22.3	22.3	21.7	21.0	20.2	19.4	18.7	-3.7%
OTT Subscriptions (m)	3.3	3.7	4.7	6.3	8.2	9.1	9.1	0.0%

Source: Omdia

Consumer spending by segment



Total video software market

	2017	2018	2019	2020	2021	2022	2023	22/23
CONSUMER LEVEL ALL VIDEO								
Total market figures include consumption of both physical and digital video								
Total spending on video (SEK m)	5,089.8	5,999.9	7,709.7	8,999.3	11,273.5	13,409.9	16,562.1	23.5%
Total spending on video (EUR m)	527.2	584.6	728.2	855.3	1,111.5	1,259.7	1,444.4	14.7%
Growth (%)		10.9%	24.6%	17.4%	30.0%	13.3%	14.7%	
Total spending on video Total Europe (EUR m)	9,632.5	11,109.4	13,467.8	17,634.9	21,442.7	23,589.9	26,435.1	12.1%
CONSUMER LEVEL DIGITAL VIDEO (OTT) – TOTAL SPENDING								
The purchase or rental of films and TV series delivered over the open internet. Digital retail numbers include purchase on content on pay TV set-top-boxes where applicable. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.								
Retail digital video (SEK m)	200.9	177.8	222.6	300.2	170.7	171.9	224.1	30.4%
Retail digital video (EUR m)	20.8	17.3	21.0	28.5	16.8	16.1	19.5	21.0%
Rental digital video (SEK m)	180.1	153.5	161.6	199.0	191.9	115.8	139.4	20.4%
Rental digital video (EUR m)	18.7	15.0	15.3	18.9	18.9	10.9	12.2	11.7%
Subscription digital video (SEK m)	3,632.2	4,940.9	6,746.3	7,978.1	10,522.3	12,851.4	15,936.6	24.0%
Subscription digital video (EUR m)	376.2	481.4	637.2	758.2	1,037.5	1,207.2	1,389.9	15.1%
Total digital video (SEK m)	4,013.2	5,272.2	7,130.4	8,477.3	10,884.9	13,139.1	16,300.0	24.1%
Total digital video (EUR m)	415.7	513.7	673.5	805.6	1,073.2	1,234.3	1,421.6	15.2%
Total digital video Total Europe (EUR m)	5,241.8	7,357.8	10,111.7	14,741.7	19,007.4	21,355.7	24,389.6	14.2%
CONSUMER LEVEL PAY TV TRANSACTIONAL VOD – TOTAL SPENDING								
The rental of film and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services, only on set-top-boxes. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.								
Pay TV TVOD (SEK m)	302.3	152.0	160.0	197.0	190.0	114.6	138.0	20.4%
Pay TV TVOD (EUR m)	31.3	14.8	15.1	18.7	18.7	10.8	12.0	11.7%
Pay TV TVOD Total Europe (EUR m)	881.1	943.4	1,021.6	1,107.1	1,068.6	1,069.0	1,030.3	-3.6%
CONSUMER LEVEL PHYSICAL VIDEO – TOTAL SPENDING								
Total market figures include consumption of legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.								
Physical video rental (SEK m)	255.5	127.0	57.0	24.8	3.5	1.6	0.6	-60.0%
Physical video rental (EUR m)	26.5	12.4	5.4	2.4	0.3	0.1	0.1	-62.8%
Physical video rental Total Europe (EUR m)	214.6	144.8	109.5	66.9	43.3	30.1	21.8	-27.6%
Physical video retail (SEK m)	518.8	448.7	362.3	300.2	195.1	154.6	123.4	-20.1%
Physical video retail (EUR m)	53.7	43.7	34.2	28.5	19.2	14.5	10.8	-25.9%
Physical video retail Total Europe (EUR m)	3,295.0	2,663.4	2,225.0	1,719.2	1,323.4	1,135.0	993.4	-12.5%
Physical video software (SEK m)	774.2	575.7	419.3	325.0	198.6	156.1	124.1	-20.5%
Physical video software (EUR m)	80.2	56.1	39.6	30.9	19.6	14.7	10.8	-26.2%
Physical video software Total Europe (EUR m)	3,509.7	2,808.2	2,334.5	1,786.1	1,366.7	1,165.1	1,015.2	-12.9%

*Notes: **1)** Consumer level digital video (OTT) and pay TV transactional VOD figures may differ from locally published figures due to the application of different definitions. **2)** Historical numbers in this section may differ from those published in previous years owing to changes in Omdia methodology, updated data sources and other data restatements **3)** The current online figures are a snapshot of the market in June 2024. Figures are updated regularly and so it may not possible to compare directly to figures published after this date. **4)** Total Europe include Austria, Belgium, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, UK, Croatia, Czech Republic, Hungary, Poland, Russia, and Slovakia. **5)** OTT Subscriptions are subscriptions to online channels and virtual pay TV operators. Figures exclude multiscreen services of pay TV operators.*

Source: Omdia

Key players in the market (in alphabetical order)

Physical	Digital	
ICA	SF Anytime B2C	Netflix
CDON	iTunes	Amazon Prime
Ginza	Viaplay	Google Play
	SF Anytime B2B	MAX

Share of European market 2023

Digital video (OTT)
5.8%

Pay TV TVOD
1.2%

Physical retail
1.1%

Physical rental
0.3%

Average home entertainment spending

Spending per TV household (EURO)
€303.3

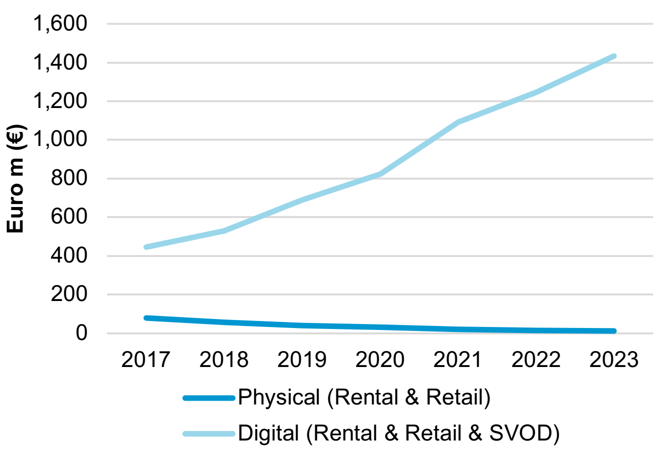
Spending per broadband household (EURO)
€364.8

Digital share of spend vs. broadband speed

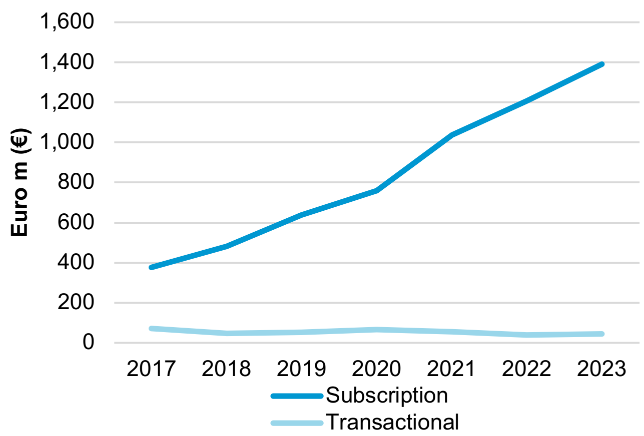
Share digital spend
98%

Broadband subscriptions speed rank
(ranked across the 9 IVF countries)*
#3

Comparison Physical vs Digital



Comparison Subscription vs Transactional



Note: Digital (Rental & Retail) includes SVOD data; Transactional excludes physical.
*Countries are ranked based on the proportion of broadband subscriptions receiving fixed data at speed over 30Mbps.

Source: Omdia