# Sweden

## Sweden key data 2021

| | |
|---|---|
| Population (m) | 10.2 |
| TV households (m) | 4.7 |
| Consumer spending on physical video software (€m) | 31.3 |
| Comparison with 2020 | -15.2% |
| Consumer spending on physical video software (€m) - Total Europe | 1,434.0 |
| Comparison with 2020 | -21.8% |
| Consumer spending on digital video and TV VoD (€m) | 676.7 |
| Comparison with 2020 | 24.2% |

| | |
|---|---|
| Consumer spending on digital video and TV VoD (€m) - Total Europe | 19,298.5 |
| Comparison with 2020 | 22.9% |
| Consumer spending on total video (€m) | 708.1 |
| Comparison with 2020 | 21.7% |
| Consumer spending on total video (€m) - Total Europe | 20,732.5 |
| Comparison with 2020 | 18.2% |
| Exchange rate EUR/SEK | 10.14 |

## Sweden key commentary

### Sweden

In 2021 the Swedish video market experienced a growth in total spending compared to 2020.

### Physical Market

2021 was another challenging year for the physical market in Sweden. During 2021, the market suffered more than anticipated.

The reasons for this decline include the limited number of new releases combined with a reduced offer of titles released theatrically and some being released directly on video online services.

In late 2021, the online store Discshop decided to close their business in Sweden and Finland which in the short term created even more challenges for the physical market.

The 4K Ultra HD format is doing well and overall growing numbers of sales of this format holds promise for the future.

### Online Distribution

As was the case with physical distribution, online sales were heavily affected by the limited number of new theatrical releases in Sweden during COVID-19 lockdown, together changing release strategies in general as regards online distribution.

A straightforward comparison of the market performance for 2021 with 2020 might be slightly misleading as release strategies shifted as a necessity following cinema closures rather than general market considerations, and from a retail perspective, the differences between 2021 and 2020 are insignificant.

## 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. Ongoing updating and improvement remains work in progress.

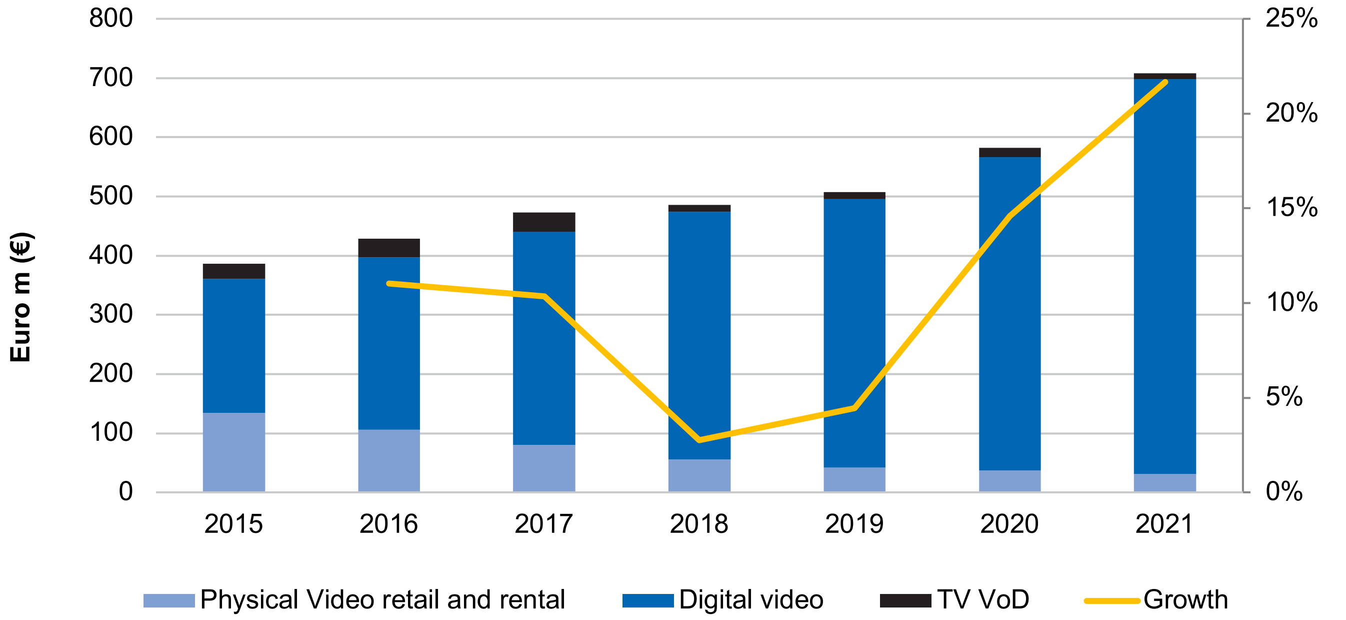
According to a new study by Mediavision on illegal streaming and downloading in the Nordic territories in 2022, the Swedish illegal market has unfortunately increased from 17 % to 20 % compared to 2021. This trend can be seen in all the Nordic territories, but Sweden has the highest figure of illegal streaming and downloads.

Furthermore, in Sweden the number of households using illegal IPTV has increased by 9 %, equal to 380 000 households.

Swedish Rightholders and the biggest ISPs in Sweden have reached an voluntary cooperation agreement to reduce the scale of copyright infringement on the internet, such as illegal streaming and file sharing. This agreement is based on a new model for handling blocking orders based on a prior court decision, as well as a common ambition to work for new and clearer legislation in Sweden. It remains to be seen, how this will impact the Swedish illegal market, but experiences from Denmark and Norway which have similar arrangements in place since a while, allows for some optimism as regards the future situation in Sweden.

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

## Consumer spending by segment






Source: Omdia

## Video market: Sweden

| | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 20/21 |
|---|---|---|---|---|---|---|---|---|
| **GENERAL** | | | | | | | | |
| Population (m) | 9.8 | 9.8 | 9.9 | 10.0 | 10.0 | 10.1 | 10.2 | 0.6% |
| TV households (m) | 4.4 | 4.5 | 4.5 | 4.6 | 4.6 | 4.7 | 4.7 | 0.7% |
| Population Total Europe (m) | 629.4 | 631.1 | 632.8 | 634.4 | 635.7 | 636.7 | 637.3 | 0.1% |
| TV households Total Europe (m) | 258.6 | 260.2 | 262.1 | 263.8 | 265.7 | 267.6 | 269.2 | 0.6% |
| Broadband households (m) | 3.3 | 3.4 | 3.5 | 3.7 | 3.7 | 3.7 | 3.8 | 2.0% |
| Nominal GDP (EUR m) | 455.4 | 465.4 | 480.1 | 470.9 | 474.9 | 469.6 | 495.7 | 5.6% |
| Consumer price index (100 in 2010) | 100.0 | 99.5 | 101.4 | 101.7 | 95.1 | 97.5 | 102.5 | 5.1% |
| Exchange rate EUR/SEK (SEK) | 9.36 | 9.47 | 9.65 | 10.26 | *10.59* | 10.52 | 10.14 | -3.6% |
| DVD Video player/recorder penetration (%) | 82.6 | 79.9 | 77.1 | 74.3 | 72.1 | 70.0 | 67.8 | -3.1% |
| Blu-ray Disc player/recorders penetration (%) | 20.6 | 20.6 | 20.3 | 19.6 | 18.8 | 18.1 | 17.7 | -2.4% |
| DVD Video player/recorder Total Europe (%) | 69.4 | 67.0 | 64.4 | 61.7 | 59.2 | 56.9 | 54.7 | -3.8% |
| Blu-ray Disc player/recorders penetration Total Europe (%) | 20.7 | 21.8 | 22.3 | 22.3 | 21.7 | 21.0 | 20.2 | -3.8% |
| OTT Subscriptions (m) | 2.4 | 2.9 | 3.4 | 3.8 | 4.7 | 6.2 | 7.4 | 18.0% |

## Total video software market

| | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 20/21 |
|---|---|---|---|---|---|---|---|---|
| **CONSUMER LEVEL ALL VIDEO** | | | | | | | | |
| *Total market figures include consumption of both physical and digital video* | | | | | | | | |
| Total spending on video (SEK m) | 3,613.7 | 4,061.9 | 4,568.8 | 4,990.9 | 5,376.6 | 6,123.8 | 7,181.5 | 17.3% |
| Total spending on video (EUR m) | 386.2 | 428.8 | 473.2 | 486.3 | 507.8 | 582.0 | 708.1 | 21.7% |
| Growth (%) | | 11.0% | 10.4% | 2.8% | 4.4% | 14.6% | 21.7% | |
| Total spending on video Total Europe (EUR m) | 9,122.1 | 9,206.7 | 9,929.1 | 11,464.3 | 13,421.5 | 17,538.9 | 20,732.5 | 18.2% |
| **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) | 424.2 | 338.7 | 255.5 | 182.0 | 122.5 | 124.9 | 102.1 | -18.3% |
| Physical video rental (EUR m) | 45.3 | 35.8 | 26.5 | 17.7 | 11.6 | 11.9 | 10.1 | -15.2% |
| Physical video rental Total Europe (EUR m) | 431.3 | 295.4 | 214.6 | 150.2 | 115.8 | 77.0 | 53.0 | -31.2% |
| Physical video retail (SEK m) | 832.8 | 665.2 | 518.8 | 394.5 | 320.9 | 264.0 | 215.7 | -18.3% |
| Physical video retail (EUR m) | 89.0 | 70.2 | 53.7 | 38.4 | 30.3 | 25.1 | 21.3 | -15.2% |
| Physical video retail Total Europe (EUR m) | 4,736.9 | 3,892.9 | 3,295.0 | 2,681.6 | 2,199.6 | 1,757.5 | 1,381.0 | -21.4% |
| Physical video software (SEK m) | 1,257.0 | 1,003.9 | 774.2 | 576.5 | 443.4 | 389.0 | 317.8 | -18.3% |
| Physical video software (EUR m) | 134.3 | 106.0 | 80.2 | 56.2 | 41.9 | 37.0 | 31.3 | -15.2% |
| Physical video software Total Europe (EUR m) | 5,168.2 | 4,188.3 | 3,509.7 | 2,831.7 | 2,315.4 | 1,834.5 | 1,434.0 | -21.8% |
| **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) | 90.1 | 102.6 | 114.7 | 124.7 | 131.9 | 137.0 | 134.1 | -2.1% |
| Retail digital video (EUR m) | 9.6 | 10.8 | 11.9 | 12.1 | 12.5 | 13.0 | 13.2 | 1.6% |
| Rental digital video (SEK m) | 115.5 | 133.4 | 145.5 | 155.4 | 162.1 | 192.5 | 189.3 | -1.7% |
| Rental digital video (EUR m) | 12.3 | 14.1 | 15.1 | 15.1 | 15.3 | 18.3 | 18.7 | 2.0% |
| Subscription digital video (SEK m) | 1,914.6 | 2,525.4 | 3,214.8 | 4,012.4 | 4,510.9 | 5,237.4 | 6,437.6 | 22.9% |
| Subscription digital video (EUR m) | 204.6 | 266.6 | 333.0 | 390.9 | 426.1 | 497.7 | 634.7 | 27.5% |
| Total digital video (SEK m) | 2,120.3 | 2,761.4 | 3,475.0 | 4,292.5 | 4,804.9 | 5,566.8 | 6,761.0 | 21.5% |
| Total digital video (EUR m) | 226.6 | 291.5 | 359.9 | 418.2 | 453.8 | 529.1 | 666.6 | 26.0% |
| Total digital video Total Europe (EUR m) | 3,046.1 | 4,076.2 | 5,394.8 | 7,557.9 | 9,980.3 | 14,491.3 | 18,137.9 | 25.2% |
| **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) | 236.4 | 296.6 | 319.5 | 122.0 | 128.4 | 168.0 | 102.7 | -38.9% |
| Pay TV TVOD (EUR m) | 25.3 | 31.3 | 33.1 | 11.9 | 12.1 | 16.0 | 10.1 | -36.6% |
| Pay TV TVOD Total Europe (EUR m) | 907.7 | 942.2 | 1,024.7 | 1,074.6 | 1,125.7 | 1,213.1 | 1,160.7 | -4.3% |

*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. **3)** The current online figures are a snapshot of the market in March 2022. 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

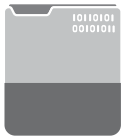
## Key players in the market (in alphabetical order)

| Physical | Digital |
|---|---|
| ICA | SF Anytime B2C |
| CDON | iTunes |
| Ginza | Viaplay |
| | SF Anytime B2B |

## Share of European market 2021

Physical retail
1.5%

Physical rental
19.0%



Digital Video (OTT)
3.7%

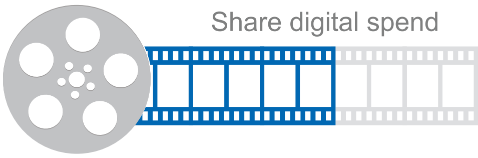
Pay TV TVOD
0.9%

## Average home entertainment spending

Spending per TV household (EURO)
€150.6

Spending per broadband household (EURO)
€186.7

## Digital share of spend vs. broadband speed



Share digital spend
94%

Broadband download speed rank
(ranked across the 9 IVF countries)

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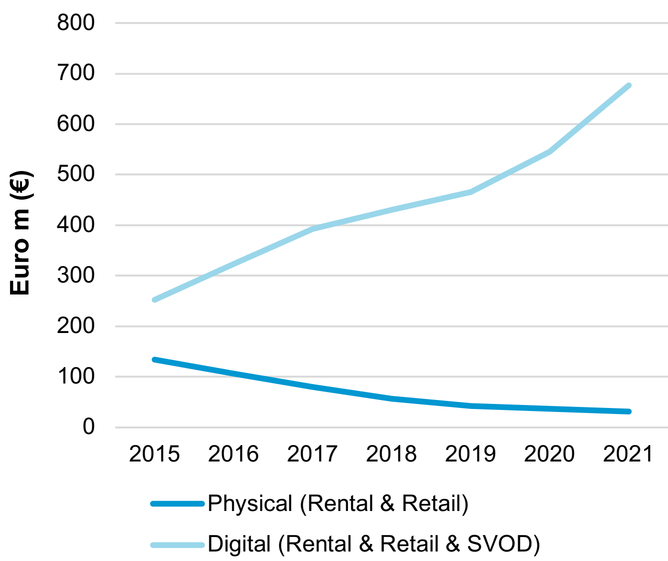
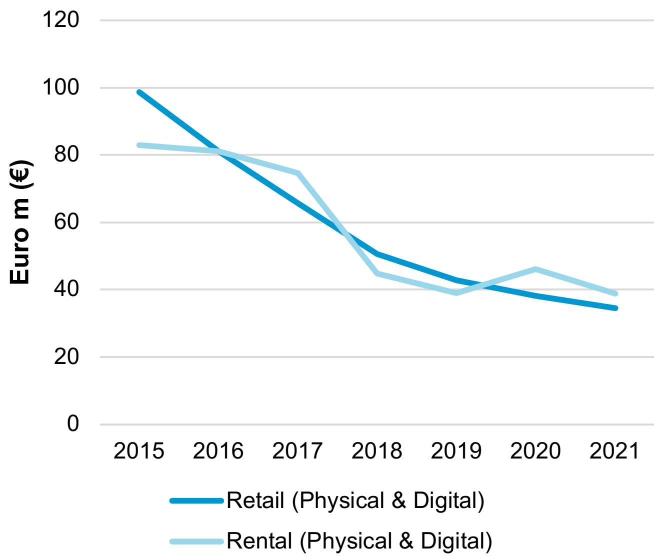
### Comparison Physical vs Digital




### Comparison Retail vs Rental




Note: Digital (Rental & Retail) includes SVOD data; Rental (Physical & Digital) excludes SVOD data



Source: Omdia