Sweden

Sweden key data 2019

Population (m)	10.0
TV households (m)	4.6
Consumer spending on physical video software (€m)	41.9
Comparison with 2018	-25.5%
Consumer spending on physical video software (€m) - Total Europe	2,356.1
Comparison with 2018	-18.3%
Consumer spending on digital video and TV VoD (€m)	503.9
Comparison with 2018	10.1%

Consumer spending on digital video and TV VoD (€m) - Total Europe	10,947.0
Comparison with 2018	29.4%
Consumer spending on total video (€m)	545.8
Comparison with 2018	6.2%
Consumer spending on total video (€m) - Total Europe	13,303.1
Comparison with 2018	17.2%
Exchange rate EUR/SEK	10.59

Sweden key commentary

Market Developments

The Swedish video market experienced 9.6% growth in total spending (SEK) on video in 2019 compared to 2018. The total video market now represents a value of more that SEK 5,780 million (€ 545.8 million). In 2019, the market for physical discs experienced a decline of 23.1% in value compared to 2018. Healthy online distribution performance double-digit growth has contributed to offsetting the decline in the market performance of physical formats. Despite the decrease, however, the physical market still represents a value of SEK 443 million (€ 42 million) which video publishers in Sweden secure by ongoing visibility of the physical home entertainment category for Swedish consumers, including through CDON, the leading Swedish online store.

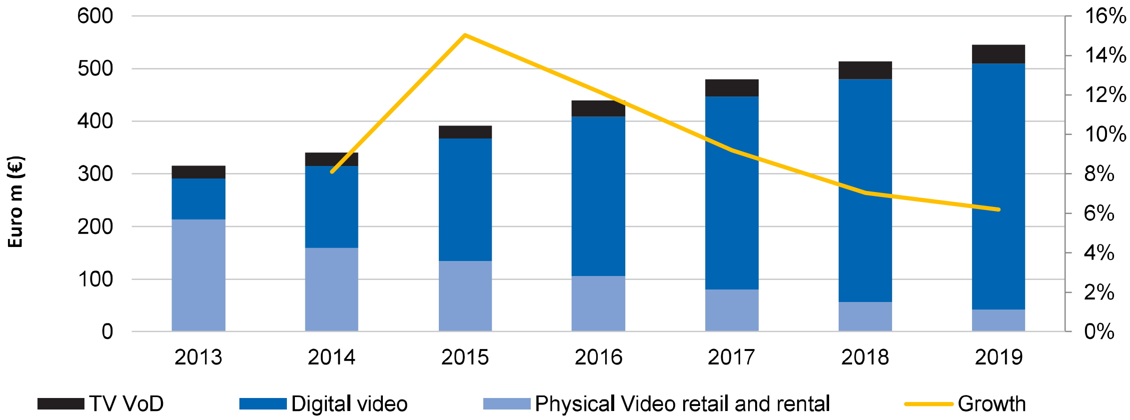
In the online space, major local video on demand services, VIAPLAY and SF ANYTIME, stimulate consumer demand together with international players such as iTunes. Consumer awareness of legal online services is supported and enhanced through the Swedish StreamLegal initiative (https://www.streamalagligt.se/na/).

Other Relevant Developments

Rättighetsalliansen (RA) (the Swedish Anti-Piracy organisation) continues its work on behalf of Swedish right holders, including in the home entertainment segment. Activities include supporting legal actions against illegal services such as Dreamfilm (condemned in the highest court in Sweden in 2019), representing right holders' interests in new Swedish legislation to strengthen the fight against IP crime, and working together with the Association for Swedish Advertisers to ensure that advertisers receive regularly updated blacklists containing information about illegal sites and services and to encourage advertisers to avoid placing advertisement on sites offering access to illegal copyright content. Income from advertisement is the biggest incentive for the illegal streaming services. Stopping the placement of advertisement on illegal streaming services and making it difficult for the illegal services to get advertisers remains an important element in the Swedish copyright content industry's efforts to fight piracy.

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

Consumer spending by segment



Source: Omdia

Video market: Sweden

	2013	2014	2015	2016	2017	2018	2019	18/19 %
GENERAL								
Population (m)	9.6	9.7	9.8	9.8	9.9	10.0	10.0	0.6%
TV households (m)	4.3	4.4	4.4	4.5	4.5	4.6	4.6	0.7%
Population Total Europe (m)	624.9	626.1	627.7	629.4	630.9	632.3	633.3	0.2%
TV households Total Europe (m)	255.0	257.3	259.3	261.3	263.2	264.9	266.7	0.7%
Broadband households (m)	2.9	3.1	3.3	3.6	3.7	3.7	3.9	3.3%
Nominal GDP (EUR m)	440.7	438.3	454.0	465.5	479.7	471.4	475.1	0.8%
Consumer price index (100 in 2010)	129.8	123.0	100.0	99.5	101.4	101.7	95.1	-6.5%
Exchange rate EUR/SEK (SEK)	8.65	9.10	9.35	9.47	*9.63*	10.26	10.59	3%
DVD Video player/recorder penetration (%)	89.3	85.3	82.6	79.9	77.1	74.3	72.1	-3.0%
Blu-ray Disc player/recorders penetration (%)	18.4	19.9	20.6	20.6	20.3	19.6	18.8	-3.9%
DVD Video player/recorder Total Europe (%)	73.2	71.5	69.4	67.0	64.4	61.7	59.2	-4.1%
Blu-ray Disc player/recorders penetration Total Europe (%)	15.4	18.4	20.7	21.8	22.3	22.3	21.7	-2.6%
OTT Subscriptions (m)	0.9	1.7	2.4	3.1	3.5	4.0	4.6	16.1%

Total video software market

	2013	2014	2015	2016	2017	2018	2019	18/19 %
CONSUMER LEVEL ALL VIDEO								
Total market figures include consumption of both physical and digital video								
Total spending on video (SEK m)	2,726.2	3,100.2	3,666.8	4,163.6	4,625.5	5,272.6	5,780.8	9.6%
Total spending on video (EUR m)	315.2	340.8	392.0	439.8	480.2	514.0	545.8	6.2%
Growth (%)		8.1%	15.0%	12.2%	9.2%	7.0%	6.2%	
Total spending on video Total Europe (EUR m)	8,453.2	8,499.2	9,142.4	9,229.7	9,830.8	11,346.4	13,303.1	17.2%
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)	512.7	422.9	424.2	338.7	255.5	182.0	122.5	-32.7%
Physical video rental (EUR m)	59.3	46.5	45.4	35.8	26.5	17.7	11.6	-34.8%
Physical video rental Total Europe (EUR m)	662.5	517.6	431.4	295.5	214.8	150.2	115.6	-23.0%
Physical video retail (SEK m)	1,331.4	1,021.7	832.8	665.2	518.8	394.5	320.9	-18.7%
Physical video retail (EUR m)	153.9	112.3	89.0	70.3	53.9	38.5	30.3	-21.2%
Physical video retail Total Europe (EUR m)	5,804.8	5,178.1	4,737.7	3,934.4	3,287.6	2,734.8	2,240.4	-18.1%
Physical video software (SEK m)	1,844.1	1,444.6	1,257.0	1,003.9	774.2	576.5	443.4	-23.1%
Physical video software (EUR m)	213.2	158.8	134.4	106.0	80.4	56.2	41.9	-25.5%
Physical video software Total Europe (EUR m)	6,467.3	5,695.7	5,169.1	4,229.9	3,502.5	2,885.0	2,356.1	-18.3%
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)	50.8	76.8	90.1	102.6	114.6	120.9	125.7	3.9%
Retail digital video (EUR m)	5.9	8.4	9.6	10.8	11.9	11.8	11.9	0.7%
Rental digital video (SEK m)	66.9	90.1	115.5	133.3	146.6	152.6	156.5	2.5%
Rental digital video (EUR m)	7.7	9.9	12.3	14.1	15.2	14.9	14.8	-0.7%
Subscription digital video (SEK m)	557.9	1,254.7	1,967.9	2,627.4	3,271.3	4,072.3	4,672.1	14.7%
Subscription digital video (EUR m)	64.5	137.9	210.4	277.5	339.6	397.0	441.1	11.1%
Total digital video (SEK m)	675.6	1,421.6	2,173.4	2,863.3	3,532.5	4,345.9	4,954.3	14.0%
Total digital video (EUR m)	78.1	156.3	232.4	302.4	366.7	423.6	467.7	10.4%
Total digital video Total Europe (EUR m)	1,270.1	2,004.8	3,089.3	4,093.6	5,354.0	7,414.4	9,837.7	32.7%
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)	206.6	234.0	236.4	296.4	318.8	350.3	383.2	9.4%
Pay TV TVOD (EUR m)	23.9	25.7	25.3	31.3	33.1	34.1	36.2	6.0%
Pay TV TVOD Total Europe (EUR m)	715.7	798.7	884.0	906.2	974.3	1,047.0	1,109.3	6.0%

*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 2020. 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
ICA
CDON
Coop
Discshop
Hemmakväll

Digital	
Bredbandsbolaget	Telia
Canal Digital	Viaplay/Viasat
Com Hem	
iTunes	
Plejmo	
SF Anytime	

Share of European market 2019

Physical retail
1.4%

Physical rental
10.0%

Digital video (OTT)
4.8%

Pay TV TVOD
3.3%

Average home entertainment spending

Spending per TV household (EURO)
€117.6

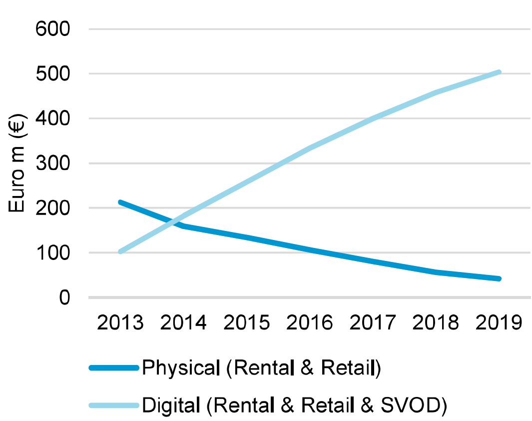
Spending per broadband household (EURO)
€141.5

Digital share of spend vs. broadband speed

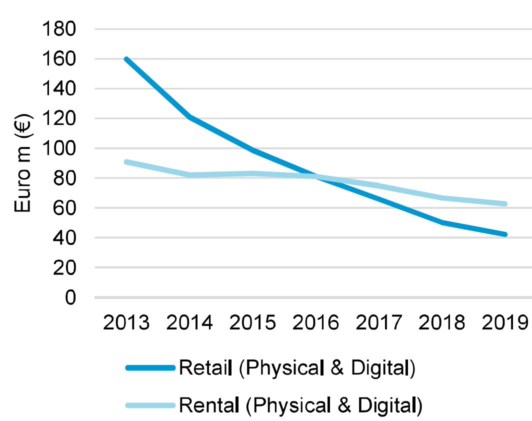
Share digital spend
86%

Broadband download speed rank
(ranked across the 9 IVF countries)
#1

Comparison Physical vs Digital



Comparison Retail vs Rental



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

Source: Omdia