Denmark

Denmark key data 2020

Population (m)	5.8
TV households (m)	2.6
Consumer spending on physical video software (€m)	22.2
Comparison with 2019	-12.5%
Consumer spending on physical video software (€m) - Total Europe	1,931.1
Comparison with 2019	-17.9%
Consumer spending on digital video and TV VoD (€m)	658.3
Comparison with 2019	36.1%
Consumer spending on digital video and TV VoD (€m) - Total Europe	15,714.0
Comparison with 2019	41.3%
Consumer spending on total video (€m)	680.6
Comparison with 2019	33.7%
Consumer spending on total video (€m) - Total Europe	17,645.1
Comparison with 2019	31.0%
Exchange rate EUR/DKK	7.46

Denmark key commentary

Status on the illegal market

Traffic data from SimilarWeb show that Danes visited illegal services approx. 12 million times a month during 2020, which indicates a stable level of visits compared to 2019. Data from previous years have shown that the number of visits to illegal websites from Danish IP addresses normally peak in January, April, July, October and December. However, in 2020 we saw a peak in visits to illegal sites from the month of February until May, most likely due to lockdown during the COVID-19 pandemic, where Danes have been more at home than they normally would be.

Data derived from a Nordic consumer study carried out by MediaVision show a decrease in the overall number of Danish users of illegal services from 450,000 in 2019 to 370,000 in 2020. Part of the explanation for the decrease of number of visits is certainly due to the effective blocking efforts of the Danish Rights Alliance and its collaboration with Danish internet providers in the Danish Telecom Industry Association based on the Code of Conduct agreement and re-directing traffic from blocked sites to legal services through the Share With Care programme.

Unfortunately, the recent years' decentralization of illegal content sharing to take place via platforms such as YouTube and Facebook have increased. This new trend makes it impossible to measure the illegal consumption. The users are not necessarily aware that they are consuming illegal content, as the platform/service itself is legal. According to data from MediaVision, 44% of Danish users who intentionally consume illegal content use YouTube and 32% use Facebook in order to find illegal content. It is estimated that there are probably more users consuming illegal content on legal platforms without being aware of it.

Blocking effects

Blocking of access to infringing websites is still considered the most effective tool to reduce the use of and access to illegal online services. By 2020, the Danish Rights Alliance had obtained 196 court orders for injunctions to block access to infringing sites. The effect of the blocking system is measurable: on average, a blocking order results in a 73% decrease in the number of visitors from Danish IP addresses.

IP Task Force

In 2020, the Danish IP Task Force at the Prosecution Service contributed efficient public redress of infringing behaviour. At the end of the year, the Task Force - which also extended its activities beyond Denmark's borders - succeeded in de facto closing the last remaining Danish anchored illegal file-sharing networks. The international nature of this particular operation sent an important and clear signal that the criminal backers of illegal services cannot hide from enforcement efforts by staying outside Denmark.

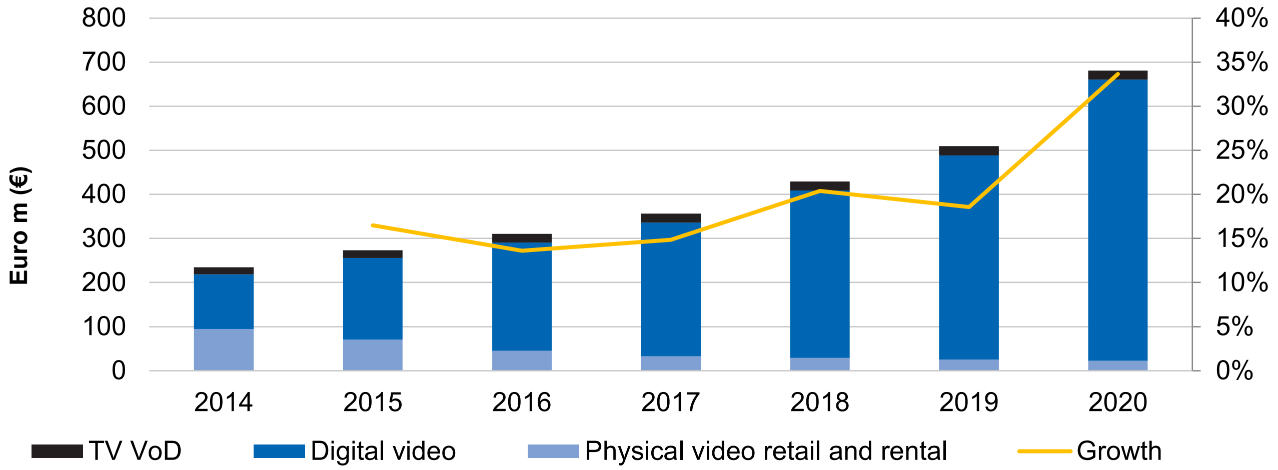
Share With Care (SWC)

The Share With Care collaboration (SWC) on blocking access to illegal sites/services and consumer information is a collaboration between the Ministry of Culture, RA and the Telecommunications Industry Association in Denmark (TI). In 2020, SWC3 served as the framework for the development of several initiatives, including an update of the Code of Conduct agreement with internet providers in the Telecom Industry Association, a further development of the search engine Filmfinder the development of a URL checker (www.sharewithcare.dk) and a new digital teaching course for primary schools called 'Del – Med Omtanke' (Think Before You Share).

For more information, please refer to the annual report from The Danish Rights Alliance

This commentary was provided by the DVA, the Danish Video Association, in cooperation with the Danish Rights Alliance.

Consumer spending by segment



Video market: Denmark

	2014	2015	2016	2017	2018	2019	2020	19/20 %
GENERAL								
Population (m)	5.7	5.7	5.7	5.7	5.8	5.8	5.8	0.4%
TV households (m)	2.5	2.5	2.5	2.6	2.6	2.6	2.6	0.4%
Population Total Europe (m)	627.7	629.4	631.1	632.9	634.5	635.9	636.9	0.2%
TV households Total Europe (m)	256.5	258.6	260.2	262.1	263.8	265.7	267.6	0.7%
Broadband households (m)	1.8	1.8	2.1	2.2	2.3	2.4	2.4	0.7%
Nominal GDP (EUR m)	265.8	272.9	283.0	294.8	302.3	312.7	305.8	-2.2%
Consumer price index (100 in 2010)	119.5	100.0	100.0	103.0	108.5	103.4	105.3	1.8%
Exchange rate EUR/DKK (DKK)	7.45	7.46	7.45	7.44	*7.45*	7.47	7.46	-0.1%
DVD Video player/recorder penetration (%)	68.2	66.7	65.5	63.7	61.5	60.0	58.8	-1.9%
Blu-ray Disc player/recorders penetration (%)	26.1	27.3	25.9	25.4	24.3	22.7	21.3	-6.3%
DVD Video player/recorder Total Europe (%)	71.6	69.4	67.0	64.4	61.7	59.2	56.9	-3.9%
Blu-ray Disc player/recorders penetration Total Europe (%)	18.4	20.7	21.8	22.3	22.3	21.7	21.0	-3.3%
OTT Subscriptions (m)	1.1	1.7	2.1	2.4	2.7	3.3	4.2	27.5%

Total video software market

	2014	2015	2016	2017	2018	2019	2020	19/20 %
CONSUMER LEVEL ALL VIDEO								
Total market figures include consumption of both physical and digital video.								
Total spending on video (DKK m)	1,748.9	2,039.7	2,312.6	2,653.5	3,200.9	3,801.9	5,074.0	33.5%
Total spending on video (EUR m)	234.7	273.3	310.5	356.7	429.4	509.2	680.6	33.6%
Growth (%)		16.5%	13.6%	14.9%	20.4%	18.6%	33.6%	
Total spending on video Total Europe (EUR m)	8,519.2	9,170.6	9,285.6	9,907.9	11,421.4	13,471.6	17,645.1	31.0%
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 (DKK m)	130.6	90.9	56.2	32.2	18.5	11.1	6.9	-37.9%
Physical video rental (EUR m)	17.5	12.2	7.6	4.3	2.5	1.5	0.9	-37.8%
Physical video rental Total Europe (EUR m)	517.6	431.4	295.5	207.5	145.2	109.8	75.0	-31.7%
Physical video retail (DKK m)	573.2	434.4	278.8	212.7	199.3	178.4	158.7	-11.1%
Physical video retail (EUR m)	76.9	58.2	37.4	28.6	26.7	23.9	21.3	-10.9%
Physical video retail Total Europe (EUR m)	5,178.1	4,737.7	3,934.4	3,287.6	2,734.8	2,241.8	1,856.1	-17.2%
Physical video software (DKK m)	703.7	525.3	335.1	244.9	217.8	189.6	165.6	-12.6%
Physical video software (EUR m)	94.4	70.4	45.0	32.9	29.2	25.4	22.2	-12.5%
Physical video software Total Europe (EUR m)	5,695.7	5,169.1	4,229.9	3,495.1	2,880.0	2,351.5	1,931.1	-17.9%
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 (DKK m)	64.6	74.9	84.0	92.8	97.3	101.0	109.8	8.8%
Retail digital video (EUR m)	8.7	10.0	11.3	12.5	13.1	13.5	14.7	8.9%
Rental digital video (DKK m)	49.9	61.3	70.8	76.9	80.7	82.5	102.0	23.6%
Rental digital video (EUR m)	6.7	8.2	9.5	10.3	10.8	11.1	13.7	23.8%
Subscription digital video (DKK m)	813.4	1,244.2	1,674.2	2,086.3	2,651.9	3,274.1	4,545.5	38.8%
Subscription digital video (EUR m)	109.1	166.7	224.8	280.5	355.8	438.5	609.7	39.0%
Total digital video (DKK m)	927.8	1,380.3	1,829.1	2,256.1	2,829.9	3,457.6	4,757.3	37.6%
Total digital video (EUR m)	124.5	185.0	245.6	303.3	379.7	463.1	638.1	37.8%
Total digital video Total Europe (EUR m)	2,005.7	3,093.6	4,105.6	5,376.5	7,427.7	9,941.6	14,501.4	45.9%
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 (DKK m)	117.3	134.0	148.4	152.5	153.3	154.7	151.0	-2.4%
Pay TV TVOD (EUR m)	15.7	18.0	19.9	20.5	20.6	20.7	20.3	-2.2%
Pay TV TVOD Total Europe (EUR m)	817.8	907.9	950.0	1,036.3	1,113.7	1,178.5	1,212.6	2.9%

*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. **3)** The current online figures are a snapshot of the market in March 2021. 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)

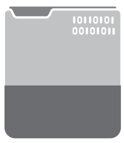
Physical	
Bilka (Salling)	Gucca.dk
CDON.dk	imusic.dk
Coolshop.dk	
Dvdoo.dk	
dvdcity.dk	
Elgiganten	
Føtex (Salling)	

Digital		
Amazon Prime	DR TV	Microsoft Store
Blockbuster	Filmcentralen	Min Bio
Canal Digital	Filmstriben	Netflix
C-more	Google Play	SF Anytime
Danishdox.com	Grand Hjemmebio	TV2 Play
Dansk Filmskat	HBO	Viaplay
Dplay	iTunes	Waoo

Share of European market 2020

Physical retail
1.1%

Physical rental
1.2%



(OTT)
4.4%

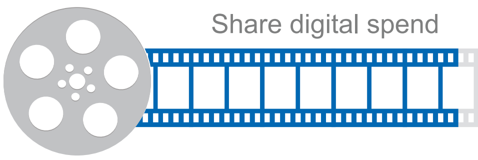
Pay TV TVOD
1.7%

Average home entertainment spending

Spending per TV household (EURO)
€261.3

Spending per broadband household (EURO)
€285.2

Digital share of spend vs. broadband speed

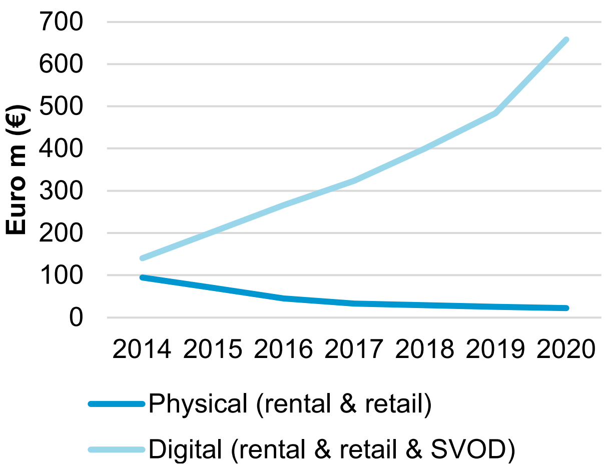


Share digital spend
94%

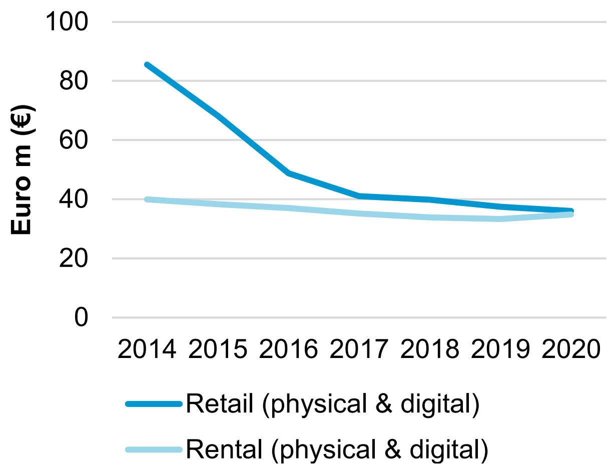
Broadband download speed rank
(ranked across the 9 IVF countries)

#4

Comparison physical vs digital



Comparison retail vs rental



Note: Digital (rental & retail) includes SVOD data; Rental (physical & digital) excludes SVOD data

Source: Omdia