Denmark

Denmark: key data 2023

Population (m)	5.9
TV households (m)	2.6
Consumer spending on total video (€m)	954.6
Comparison with 2022	9.6%
Consumer spending on digital video and TV VoD (€m)	822.2
Comparison with 2022	12.1%
Consumer spending on physical video software (€m)	14.1
Comparison with 2022	-13.1%

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%
Exchange rate EUR/DKK	7.45

Denmark key commentary

Market Developments

The Danish market saw 9.6% growth in total consumer spending on video in 2023 compared to 2022. The total Danish video market now represents a value of more that DKK 6.112 million (€ 954.6 million). The market for physical discs did experience a decline of 13.1% in value in 2023 compared to 2022. However, healthy online distribution performance contributed to offsetting the contraction in the market performance of physical formats which despite the decrease, still represents a value of DKK 105.4 million (€ 14.1 million).

The Danish industry initiative Filmhitlisten (www.filmhitlisten.dk) continues to offer weekly insight into the best-performing titles on online transactional services (sell-through and rental).

The market for illegal content and services in Denmark

Films, TV series, TV and live content such as sport remain at the top of the list when it comes to illegal streaming of content. The latest figures on the Danish consumption of illegal content are found in a survey conducted by the Danish Chamber of Commerce in December 2022 and published in 2023. The survey shows that 9% of Danes have streamed or downloaded on an illegal basis films, TV series or similar within the last year, and that an additional15% of Danes have done so more than a year ago. When the illegal access to films, TV series and live content isconsiderable, it is also an expression of the high popularity among consumers of these types of content across all platforms and the technical applications deployed for the illegal sharing of content.

It is not new that a significant portion of illegal content is shared and accessed through social media in Denmark. Nearly 9% of Danes have shared, accessed or received illegal content via social media within a period of one year, according to the survey by the Danish Chamber of Commerce and the Danish Rights Alliance. YouTube, Facebook, TikTok, Messenger, Instagram and Snapchat are the most widely used platforms for accessing illegal content.

Blocking access to illegal sites and services

The Danish Rights Alliance's efforts to protect films and TV series include measures against illegal file sharing services, IPTV solutions and seedboxes, the blocking of foreign illegal sites, the unauthorized resale of hacked access information for streaming services, password-sharing and, last but not least, blocking illegal content on social media.

Share With Care (SWC)

The "Share With Care" collaboration (SWC) on blocking access to illegal sites coupled with enhanced consumer information on and discoverability of legal services is a collaboration between the Ministry of Culture, the Danish Rights Alliance and the Telecommunications Industry Association in Denmark (TI). The Code of Conduct agreement with the internet providers which are members of the Telecom Industry Association was revised in 2022. The revision enables ISPs automatically to retrieve an updated list of sites to be blocked, and the process of getting them blocked has been streamlined. All blocking takes place based on a court decision that the blocked service is illegal.

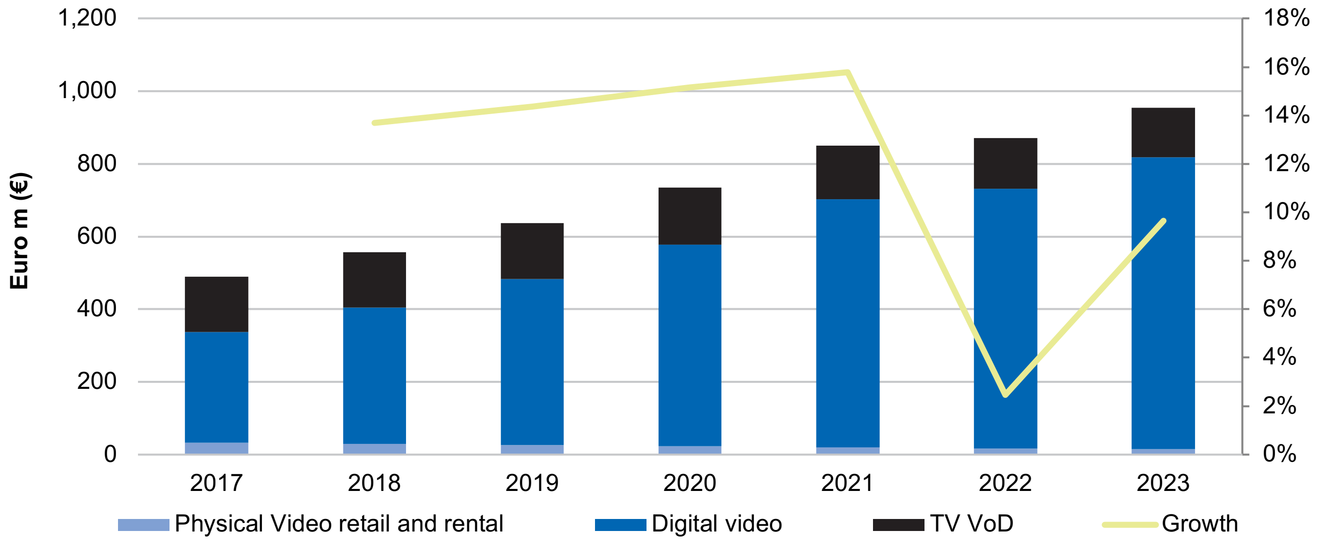
As part of the SWC initiative, the Danish Rights Alliance launched a nationwide film competition for 4th-6th grader children based on the teaching course 'Del – Med Omtanke' (Think before you share) where they competed in making the best film about the subject of value and importance of copyright. The purpose of the competition was to get Danish school students to work creatively with copyright and thus give them an understanding of why content needs to be protected for the interests of creators and businesses alike.

This commentary was provided by the International Video Federation

Video market: Denmark

	2017	2018	2019	2020	2021	2022	2023	22/23
GENERAL								
Population (m)	5.7	5.8	5.8	5.8	5.8	5.8	5.9	0.4%
TV households (m)	2.6	2.6	2.6	2.6	2.6	2.6	2.6	0.5%
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)	2.1	2.1	2.2	2.2	2.2	2.3	2.3	1.5%
Nominal GDP (EUR m)	294.8	302.3	312.7	305.8	315.2	325.8	331.3	1.7%
Consumer price index (100 in 2010)	103.0	108.5	103.4	105.3	108.2	110.1	115.6	5.0%
Exchange rate EUR/DKK (DKK)	7.46	7.46	7.47	7.47	7.44	7.45	7.45	0.0%
DVD Video player/recorder penetration (%)	63.7	61.5	60.0	58.8	57.6	56.4	55.3	-1.9%
Blu-ray Disc player/recorders penetration (%)	25.4	24.3	22.7	21.3	20.2	19.4	18.8	-3.1%
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)	2.3	2.7	3.4	4.4	5.5	6.0	6.2	3.5%

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 (DKK m)	2,538.2	3,033.5	3,624.8	4,341.6	5,242.7	5,464.3	6,112.7	11.9%
Total spending on video (EUR m)	490.2	557.3	637.4	734.0	849.8	870.7	954.6	9.6%
Growth (%)		13.7%	14.4%	15.2%	15.8%	2.5%	9.6%	
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 (DKK m)	92.8	96.9	100.3	108.8	103.6	106.1	106.2	0.1%
Retail digital video (EUR m)	12.4	13.0	13.4	14.6	13.9	14.2	14.3	0.1%
Rental digital video (DKK m)	76.9	80.7	82.5	100.6	98.2	88.1	86.6	-1.7%
Rental digital video (EUR m)	10.3	10.8	11.1	13.5	13.2	11.8	11.6	-1.6%
Subscription digital video (DKK m)	2,103.1	2,617.7	3,231.7	3,945.5	4,877.5	5,130.1	5,796.2	13.0%
Subscription digital video (EUR m)	282.0	351.0	432.8	528.0	656.0	688.5	778.0	13.0%
Total digital video (DKK m)	2,272.8	2,795.2	3,414.5	4,154.9	5,079.3	5,324.3	5,989.0	12.5%
Total digital video (EUR m)	304.8	374.8	457.3	556.0	683.1	714.6	803.9	12.5%
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 (DKK m)	152.5	153.3	154.7	155.8	147.5	139.8	136.6	-2.3%
Pay TV TVOD (EUR m)	20.5	20.6	20.7	20.8	19.8	18.8	18.3	-2.3%
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 (DKK m)	32.2	18.5	11.1	6.9	4.2	2.5	1.5	-39.2%
Physical video rental (EUR m)	4.3	2.5	1.5	0.9	0.6	0.3	0.2	-39.2%
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 (DKK m)	212.7	199.3	178.4	158.9	139.4	118.7	103.9	-12.5%
Physical video retail (EUR m)	28.5	26.7	23.9	21.3	18.7	15.9	13.9	-12.5%
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 (DKK m)	244.9	217.8	189.6	165.9	143.6	121.3	105.4	-13.1%
Physical video software (EUR m)	32.8	29.2	25.4	22.2	19.3	16.3	14.1	-13.1%
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)** Note 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	
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 2023

Digital video (OTT)
3.3%

Pay TV TVOD
13.3%

Physical retail
1.4%

Physical rental
1.0%

Average home entertainment spending

Spending per TV household (EURO)
€361.6

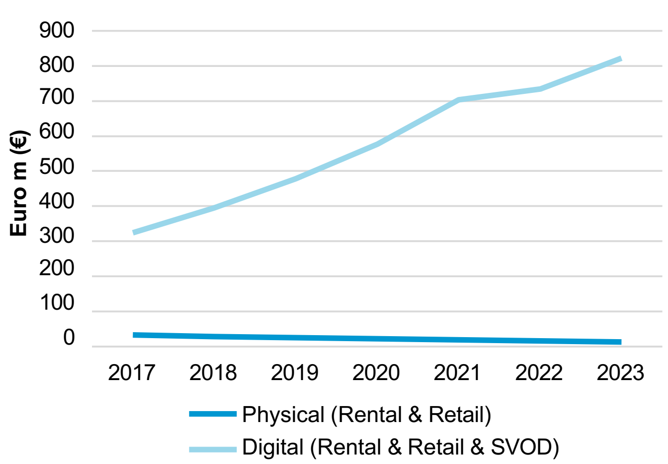
Spending per broadband household (EURO)
€417.9

Digital share of spend vs. broadband speed

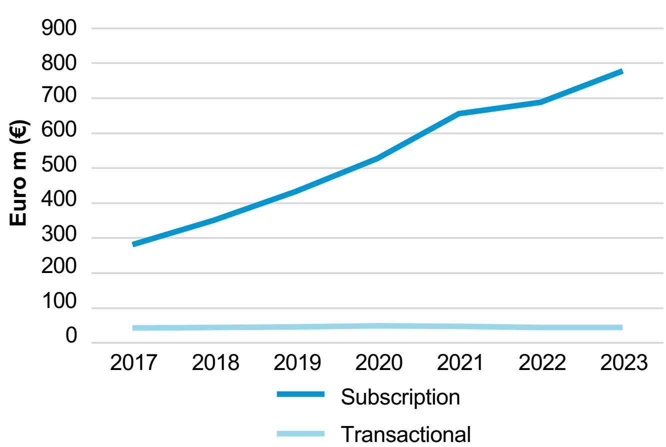
Share digital spend
98%

Broadband subscriptions speed rank
(ranked across the 9 IVF countries)*
#7

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