Sweden

Sweden key data 2022

Population (m)	10.2
TV households (m)	4.7
Consumer spending on total video (€m)	799.3
Comparison with 2021	12.9%
Consumer spending on digital video and TV VoD (€m)	784.6
Comparison with 2021	14.0%
Consumer spending on physical video software (€m)	14.7
Comparison with 2021	-25.1%

Consumer spending on total video (€m) - Total Europe	23,276.4
Comparison with 2021	9.4%
Consumer spending on digital video and TV VoD (€m) - Total Europe	22,110.8
Comparison with 2021	11.1%
Consumer spending on physical video software (€m) - Total Europe	1,165.6
Comparison with 2021	-14.7%
Exchange rate EUR/SEK	10.65

Sweden key commentary

Sweden

In 2022, the overall Swedish video market experienced growth in total consumer spending compared to 2021.

Physical Market

As anticipated, 2022 was another challenging year for the physical market in Sweden.

The reason for this decline was partly due to the aftermath of the pandemic, but also due to changing release strategies, including efforts to promote consumer uptake of online access options. Part of the decline may also be linked to the closure of specialized physical and online retailers and/or lack of exposure/stock in non-specialized physical shops, supermarkets, etc.

The 4K Ultra HD format is doing well with continued growing numbers of sales of this format.

Online Distribution

As was the case with physical distribution, online sales were still affected by the limited number of new strong theatrical releases in Sweden, together with changing release strategies in general to promote consumer uptake of online distribution options, including title-by-title tailor-made release strategies.

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 2023 edition of the study by Mediavision on illegal streaming and downloading in the Nordic territories, the Swedish illegal market has unfortunately increased from 20 % to 25 % compared to 2022. A similar trend is recorded across the Nordic territories, but Sweden has the highest figure of illegal streaming and downloads.

Furthermore, the number of households using illegal IPTV in Sweden has increased by 11 %, equal to 490 000 households.

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The Swedish Rightholders organization and the biggest ISPs in Sweden have reached a voluntary cooperation agreement to reduce 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 in favour of 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 had similar arrangements in place for 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.

Video market: Sweden

	2016	2017	2018	2019	2020	2021	2022	21/22
GENERAL								
Population (m)	9.8	9.9	10.0	10.0	10.1	10.2	10.2	0.6%
TV households (m)	4.5	4.5	4.6	4.6	4.7	4.7	4.7	0.6%
Population Total Europe (m)	631.1	632.8	634.4	635.7	636.7	637.3	637.7	0.1%
TV households Total Europe (m)	260.2	262.1	263.8	265.7	267.6	269.2	270.7	0.6%
Broadband households (m)	3.3	3.5	3.6	3.7	3.8	3.8	3.9	1.5%
Nominal GDP (EUR m)	465.4	480.1	470.9	474.9	469.6	495.7	514.7	3.8%
Consumer price index (100 in 2010)	99.5	101.4	101.7	95.1	97.5	102.5	105.3	2.7%
Exchange rate EUR/SEK (SEK)	9.47	9.65	10.26	10.59	*10.52*	10.14	10.65	5.0%
DVD Video player/recorder penetration (%)	79.9	77.1	74.3	72.1	70.0	67.8	65.7	-3.1%
Blu-ray Disc player/recorders penetration (%)	20.6	20.3	19.6	18.8	18.1	17.7	17.3	-2.1%
DVD Video player/recorder Total Europe (%)	67.0	64.4	61.7	59.2	56.9	54.7	52.7	-3.7%
Blu-ray Disc player/recorders penetration Total Europe (%)	21.8	22.3	22.3	21.7	21.0	20.2	19.4	-3.9%
OTT Subscriptions (m)	2.9	3.4	3.8	4.7	6.3	7.5	9.6	27.5%

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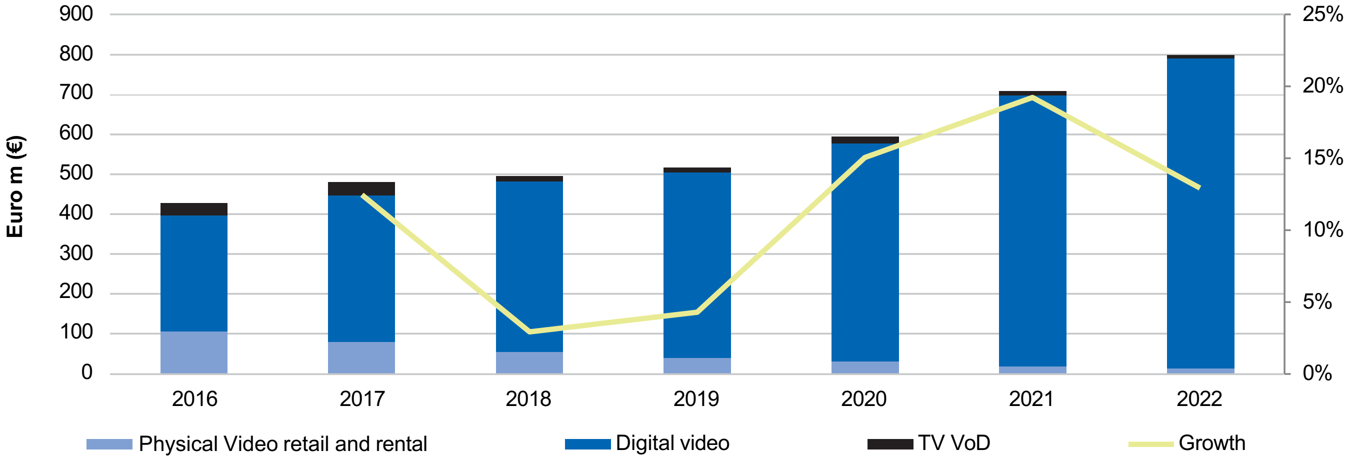
Consumer spending by segment



Total video software market

	2016	2017	2018	2019	2020	2021	2022	21/22
CONSUMER LEVEL ALL VIDEO								
Total market figures include consumption of both physical and digital video								
Total spending on video (SEK m)	4,049.1	4,641.4	5,078.1	5,462.2	6,245.2	7,178.5	8,508.8	18.5%
Total spending on video (EUR m)	427.4	480.7	494.8	515.9	593.5	707.8	799.3	12.9%
Growth (%)		12.5%	2.9%	4.3%	15.0%	19.2%	12.9%	
Total spending on video Total Europe (EUR m)	9,204.5	9,924.5	11,389.9	13,601.0	17,690.1	21,274.6	23,276.4	9.4%
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)	102.6	200.7	206.4	225.1	297.2	207.0	223.8	8.1%
Retail digital video (EUR m)	10.8	20.8	20.1	21.3	28.2	20.4	21.0	3.0%
Rental digital video (SEK m)	133.3	180.1	253.1	281.2	362.6	319.9	410.4	28.3%
Rental digital video (EUR m)	14.1	18.7	24.7	26.6	34.5	31.5	38.6	22.2%
Subscription digital video (SEK m)	2,512.7	3,166.8	3,920.9	4,408.1	5,092.4	6,350.2	7,626.6	20.1%
Subscription digital video (EUR m)	265.2	328.0	382.0	416.4	484.0	626.1	716.4	14.4%
Total digital video (SEK m)	2,748.6	3,547.6	4,380.4	4,914.5	5,752.2	6,877.1	8,260.9	20.1%
Total digital video (EUR m)	290.1	367.4	426.8	464.2	546.7	678.1	776.0	14.4%
Total digital video Total Europe (EUR m)	4,068.6	5,387.4	7,505.6	10,135.9	14,705.6	18,771.8	21,019.0	12.0%
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)	296.6	319.5	122.0	128.4	168.0	102.7	91.8	-10.7%
Pay TV TVOD (EUR m)	31.3	33.1	11.9	12.1	16.0	10.1	8.6	-14.9%
Pay TV TVOD Total Europe (EUR m)	947.5	1,027.4	1,076.1	1,130.6	1,198.4	1,136.1	1,091.8	-3.9%
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)	338.7	255.5	127.0	57.0	24.8	3.5	1.6	-54.6%
Physical video rental (EUR m)	35.8	26.5	12.4	5.4	2.4	0.3	0.1	-56.7%
Physical video rental Total Europe (EUR m)	295.4	214.6	144.8	109.5	66.9	43.3	30.6	-29.5%
Physical video retail (SEK m)	665.2	518.8	448.7	362.3	300.2	195.1	154.6	-20.8%
Physical video retail (EUR m)	70.2	53.7	43.7	34.2	28.5	19.2	14.5	-24.5%
Physical video retail Total Europe (EUR m)	3,892.9	3,295.0	2,663.4	2,225.0	1,719.2	1,323.4	1,135.0	-14.2%
Physical video software (SEK m)	1,003.9	774.2	575.7	419.3	325.0	198.6	156.1	-21.4%
Physical video software (EUR m)	106.0	80.2	56.1	39.6	30.9	19.6	14.7	-25.1%
Physical video software Total Europe (EUR m)	4,188.3	3,509.7	2,808.2	2,334.5	1,786.1	1,366.7	1,165.6	-14.7%

*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 2023. 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.*

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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 2022

Digital video (OTT)
3.7%

Pay TV TVOD
0.8%

Physical retail
0.5%

Physical rental
1.3%

Average home entertainment spending

Spending per TV household (EURO)
€168.9

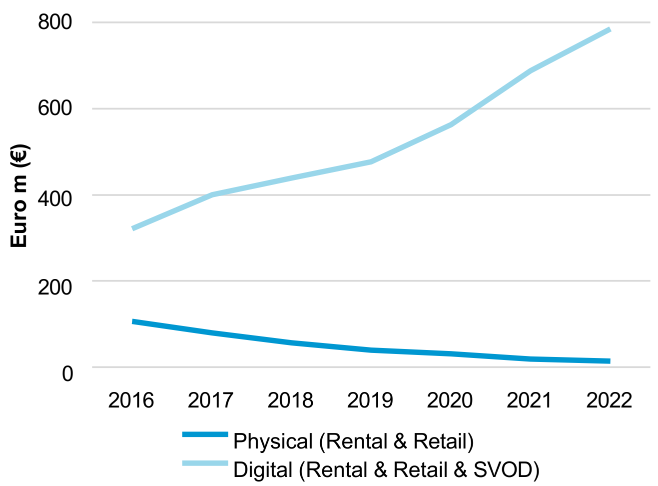
Spending per broadband household (EURO)
€206.8

Digital share of spend vs. broadband speed

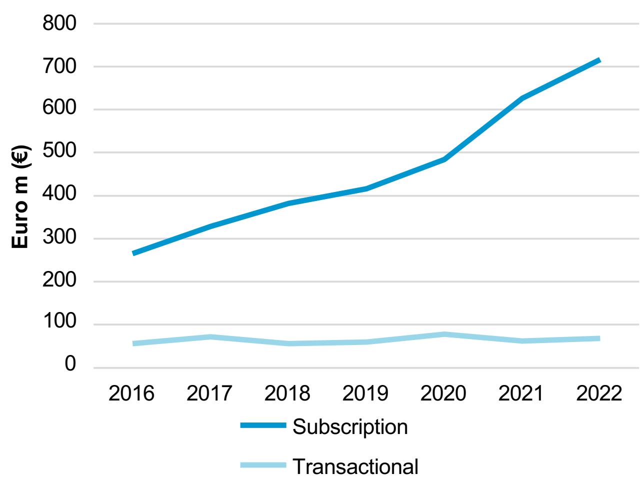
Share digital spend
97%

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.

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Source: Omdia