

Denmark

Denmark key data 2021

Population (m)	5.8	Consumer spending on digital video and TV VoD (€m) - Total Europe	19,298.5
TV households (m)	2.6	Comparison with 2020	22.9%
Consumer spending on physical video software (€m)	19.3	Consumer spending on total video (€m)	607.8
Comparison with 2020	-13.0%	Comparison with 2020	11.8%
Consumer spending on physical video software (€m) - Total Europe	1,434.0	Consumer spending on total video (€m) - Total Europe	20,732.5
Comparison with 2020	-21.8%	Comparison with 2020	18.2%
Consumer spending on digital video and TV VoD (€m)	588.5	Exchange rate EUR/DKK	7.44
Comparison with 2020	12.8%		

Denmark key commentary

Market Developments

The Danish market saw an 11.8% growth in total consumer spending on video in 2021 compared to 2020. The total Danish video market now represents a value of more than DKK 4,591 million (€ 607.8 million). The market for physical discs did experience a decline of 13% in value in 2021 compared to 2020. 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 143.6 million (€ 19.3 million).

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

The market for illegal content and services in Denmark

Data derived from a Nordic consumer study carried out by MediaVision “Nordic Piracy – Spring 2022”, indicates that the Danish illegal consumption of films and TV series is growing. As many as 580,000 Danes watch films and TV series illegally according to the study. This represents an increase of 80,000 Danish users of illegal content and services since the spring of 2021. In other words, as many as 13% of the Danish population between the age of 15 and 74, consume films and TV series through illegal services. This is the highest share since 2014, where MediaVision began measuring the illegal consumption.

The MediaVision data also shows that over 70 % of Danish users who intentionally consume illegal content use YouTube and Facebook to find illegal content and/or services.

The survey also shows that Danish content is in high demand: Danish-produced films and TV series make up 40% of the titles accessed illegally by Danish consumers. This is a notable increase from 32% in 2021 and 21% in 2020. A development that will be felt by Danish right holders across the creative and business value chain if the development is not reversed.

Blocking access to illegal sites and services

Blocking of access to infringing websites and services is considered among the most efficient tool to reduce the use of and access to illegal online services in Denmark. 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 delivered efficient public redress of infringing behavior. The Task Force has extended its activities beyond Denmark's borders which has contributed to the de facto closing of the last remaining Danish anchored illegal file-sharing network. 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 locating outside Denmark.

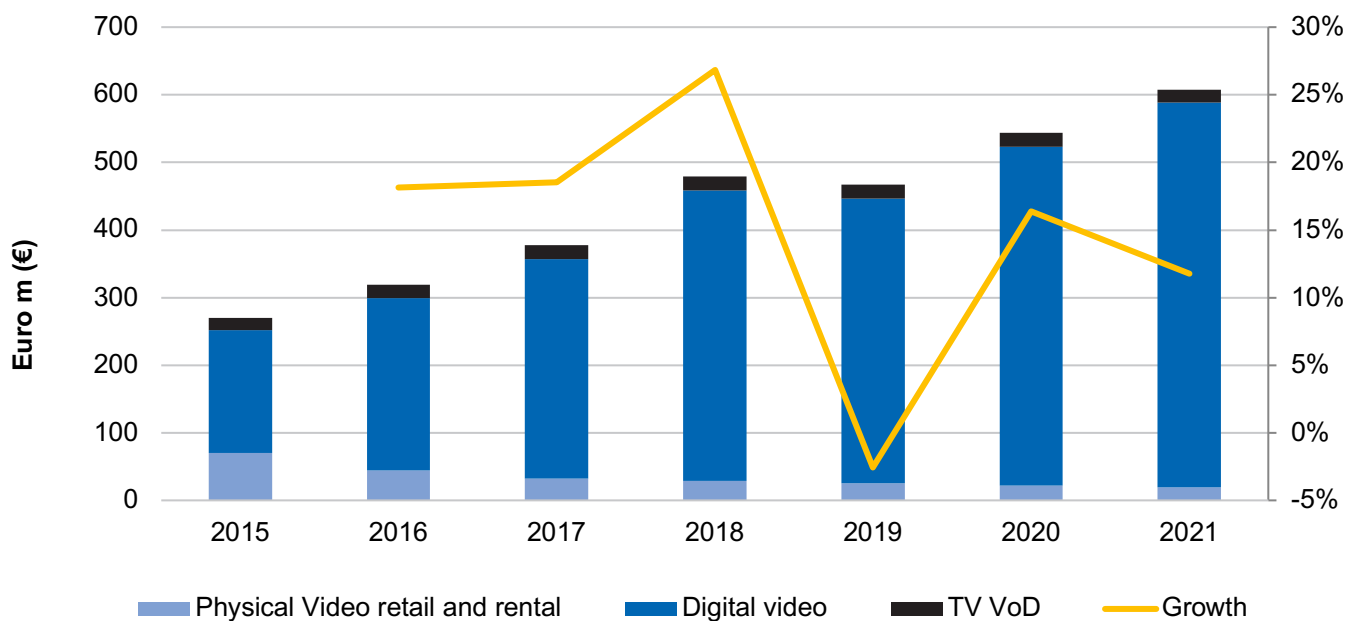
Share With Care

The Share With Care collaboration (SWC) on blocking access to illegal sites/services coupled with enhanced consumer information on legal services is a collaboration between the Ministry of Culture, the Danish Rightholder Alliance and the Telecommunications Industry Association in Denmark (TI). In 2020, SWC3 served as the framework for the development of several new initiatives, including an update of the Code of Conduct agreement with internet providers in the Telecom Industry Association, a further development of the title-based 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 International Video Federation

Consumer spending by segment



Video market: Denmark

	2015	2016	2017	2018	2019	2020	2021	20/21
GENERAL								
Population (m)	5.7	5.7	5.7	5.8	5.8	5.8	5.8	0.4%
TV households (m)	2.5	2.5	2.6	2.6	2.6	2.6	2.6	0.4%
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)	1.8	2.1	2.2	2.3	2.4	2.4	2.4	0.9%
Nominal GDP (EUR m)	272.9	283.0	294.8	302.3	312.7	305.8	315.2	3.1%
Consumer price index (100 in 2010)	100.0	100.0	103.0	108.5	103.4	105.3	108.2	2.8%
Exchange rate EUR/DKK (DKK)	7.46	7.45	7.46	7.46	7.47	7.47	7.44	-0.5%
DVD Video player/recorder penetration (%)	66.7	65.5	63.7	61.5	60.0	58.8	57.6	-2.1%
Blu-ray Disc player/recorders penetration (%)	27.3	25.9	25.4	24.3	22.7	21.3	20.2	-5.3%
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)	1.7	2.1	2.5	3.0	3.9	5.0	5.7	15.2%

Total video software market

	2015	2016	2017	2018	2019	2020	2021	20/21
CONSUMER LEVEL ALL VIDEO								
<i>Total market figures include consumption of both physical and digital video</i>								
Total spending on video (DKK m)	2,015.3	2,376.5	2,818.4	3,574.9	3,488.3	4,063.1	4,519.8	11.2%
Total spending on video (EUR m)	270.0	318.9	378.0	479.4	467.2	543.7	607.8	11.8%
Growth (%)		18.1%	18.5%	26.8%	-2.5%	16.4%	11.8%	
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								
<i>Total market figures include consumption of legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.</i>								
Physical video rental (DKK m)	90.9	56.2	32.2	18.5	11.1	6.9	4.2	-38.9%
Physical video rental (EUR m)	12.2	7.5	4.3	2.5	1.5	0.9	0.6	-38.6%
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 (DKK m)	434.4	278.8	212.7	199.3	178.4	158.9	139.4	-12.3%
Physical video retail (EUR m)	58.2	37.4	28.5	26.7	23.9	21.3	18.7	-11.9%
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 (DKK m)	525.3	335.1	244.9	217.8	189.6	165.9	143.6	-13.4%
Physical video software (EUR m)	70.4	45.0	32.8	29.2	25.4	22.2	19.3	-13.0%
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								
<i>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.</i>								
Retail digital video (DKK m)	74.9	84.1	93.0	97.3	101.0	109.8	104.3	-5.0%
Retail digital video (EUR m)	10.0	11.3	12.5	13.1	13.5	14.7	14.0	-4.5%
Rental digital video (DKK m)	61.3	70.9	77.1	80.7	82.5	101.6	98.3	-3.2%
Rental digital video (EUR m)	8.2	9.5	10.3	10.8	11.1	13.6	13.2	-2.7%
Subscription digital video (DKK m)	1,219.7	1,738.0	2,250.5	3,025.7	2,960.5	3,534.4	4,027.8	14.0%
Subscription digital video (EUR m)	163.4	233.2	301.8	405.7	396.5	473.0	541.7	14.5%
Total digital video (DKK m)	1,355.9	1,892.9	2,420.7	3,203.7	3,144.0	3,745.8	4,230.4	12.9%
Total digital video (EUR m)	181.6	254.0	324.6	429.6	421.1	501.3	568.9	13.5%
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								
<i>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.</i>								
Pay TV TVOD (DKK m)	134.1	148.5	152.9	153.4	154.7	151.4	145.7	-3.7%
Pay TV TVOD (EUR m)	18.0	19.9	20.5	20.6	20.7	20.3	19.6	-3.3%
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 be 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.

Key players in the market (in alphabetical order)

Physical		Digital		
Bilka (Salling)	Gucca.dk	Amazon Prime	DR TV	Microsoft Store
CDON.dk	imusic.dk	Blockbuster	Filmcentralen	Min Bio
Coolshop.dk		Canal Digital	Filmstriben	Netflix
Dvdoo.dk		C-more	Google Play	SF Anytime
dvdcity.dk		Danishdox.com	Grand Hjemmebio	TV2 Play
Elgiganten		Dansk Filmskat	HBO	Viaplay
Føtex (Salling)		Dplay	iTunes	Wao

Share of European market 2021



Physical retail
1.4%



Physical rental
1.1%



Digital Video (OTT)
3.1%



Pay TV TVOD
1.7%

Average home entertainment spending



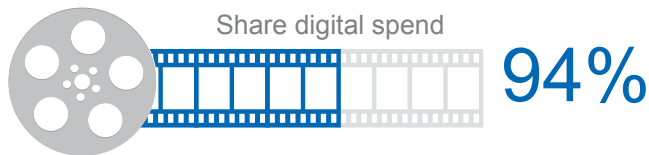
Spending per TV household (EURO)
€232.3



Spending per broadband household (EURO)
€252.5



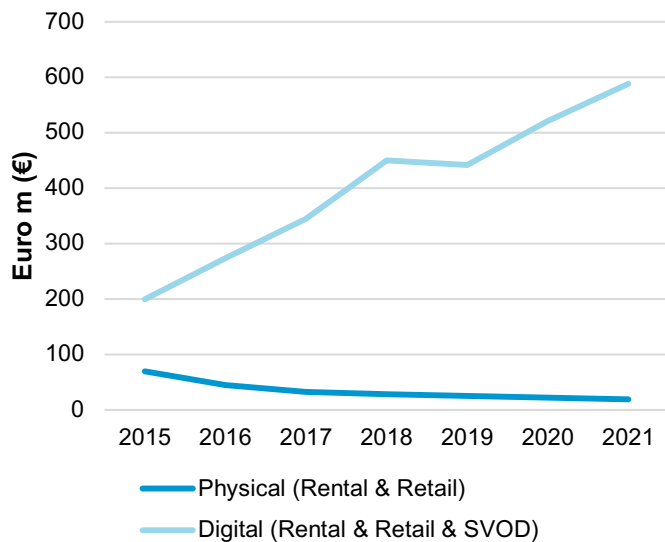
Digital share of spend vs. broadband speed



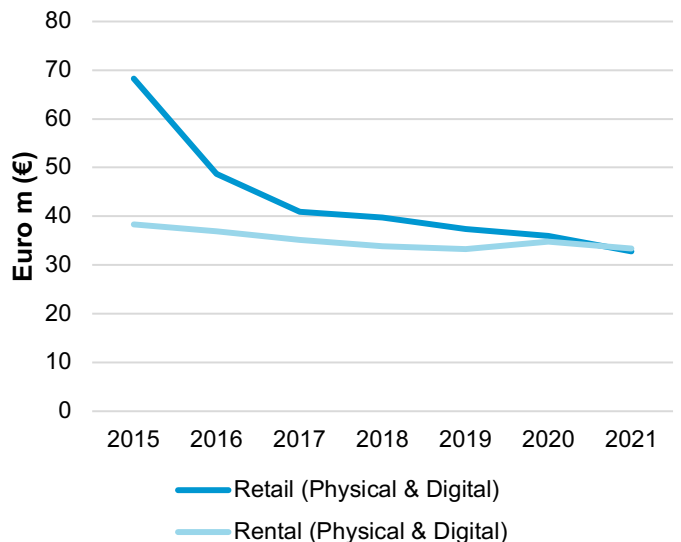
Broadband download speed rank
(ranked across the 9 IVF countries)



Comparison Physical vs Digital



Comparison Retail vs Rental



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