Denmark

Denmark key data 2022

Population (m)	5.8
TV households (m)	2.6
Consumer spending on total video (€m)	871.2
Comparison with 2021	2.8%
Consumer spending on digital video and TV VoD (€m)	733.8
Comparison with 2021	4.8%
Consumer spending on physical video software (€m)	16.3
Comparison with 2021	-15.7%

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/DKK	7.45

Denmark key commentary

Market Developments

The Danish market saw 2.8% growth in total consumer spending on video in 2022 compared to 2021. The total Danish video market now represents a value of more that DKK 4,468 million (€ 871.2 million). The market for physical discs did experience a decline of 15.7% in value in 2022 compared to 2021. 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 121.3 million (€ 16.3 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 2023", indicates that the Danish illegal consumption of films and TV series is growing. As many as 880,000 Danes watch films and TV series illegally according to the study. This represents an increase of 300,000 Danish users of illegal content and services since the spring of 2022. In other words, as many as 20% 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, when MediaVision began measuring illegal consumption. Social media platforms such as YouTube, Snapchat, TikTok and Facebook are the most popular sites for illegal streaming among the Danish pirates. Danish content is in high demand: More than a third of all illegally obtained titles are Danish - 33% of films and 37% of series.

Blocking access to illegal sites and services

Blocking of access to infringing websites and services is considered among the most efficient tools to reduce the use of and access to illegal online services in Denmark. By spring 2023, the Danish Rights Alliance had obtained 239 court orders for injunctions to block access to infringing sites (domains). Furthermore, we are blocking 1146 mirror 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.

Share With Care

The "Share With Care" collaboration (SWC) on blocking access to illegal sites coupled with enhanced consumer information on 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 internet providers in the Telecom Industry Association was revised in 2022. The revision enables ISPs to automatically retrieve an updated list of sites to be blocked, and the process of getting them blocked has been speeded up. 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 graders based on the teaching course 'Del – Med Omtanke' (Think before you share) where they competed in making the best film about the subject of rights. The purpose of the film 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 as well as the creators.

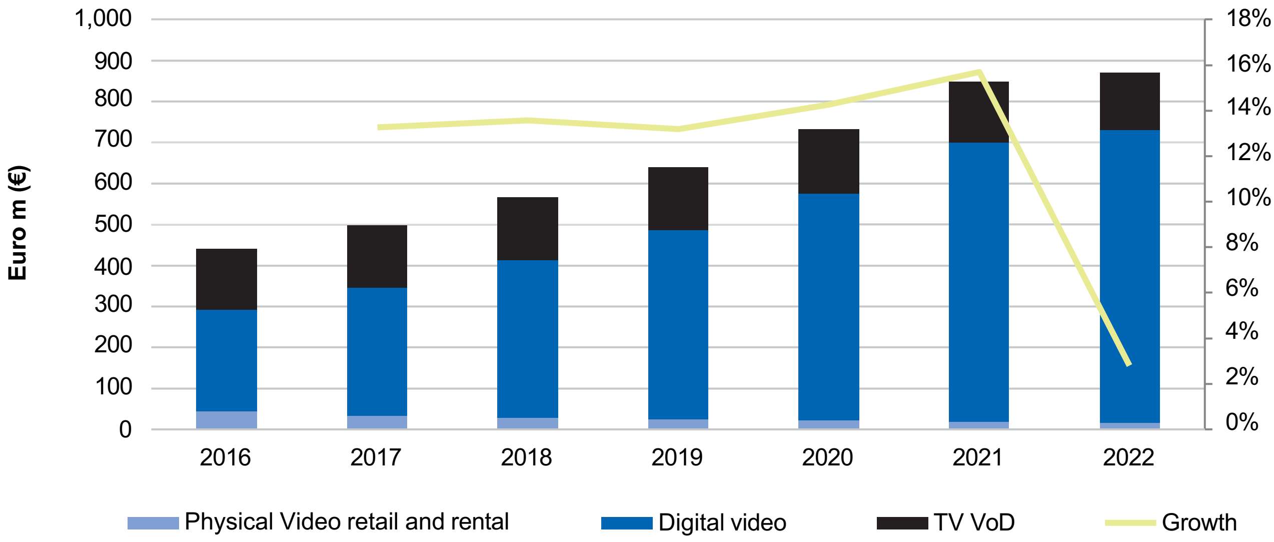
For more information, please refer to the annual report from The Danish Rights Alliance

This commentary was provided by the International Video Federation

Video market: Denmark

	2016	2017	2018	2019	2020	2021	2022	21/22
GENERAL								
Population (m)	5.7	5.7	5.8	5.8	5.8	5.8	5.8	0.4%
TV households (m)	2.5	2.6	2.6	2.6	2.6	2.6	2.6	0.5%
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)	2.1	2.1	2.1	2.2	2.2	2.2	2.3	0.4%
Nominal GDP (EUR m)	283.0	294.8	302.3	312.7	305.8	315.2	325.8	3.4%
Consumer price index (100 in 2010)	100.0	103.0	108.5	103.4	105.3	108.2	110.1	1.7%
Exchange rate EUR/DKK (DKK)	7.45	7.46	7.46	7.47	7.47	7.44	7.45	0.2%
DVD Video player/recorder penetration (%)	65.5	63.7	61.5	60.0	58.8	57.6	56.4	-2.1%
Blu-ray Disc player/recorders penetration (%)	25.9	25.4	24.3	22.7	21.3	20.2	19.4	-3.9%
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)	2.0	2.4	2.8	3.4	4.5	5.4	6.5	21.4%

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 (DKK m)	2,194.5	2,601.1	3,100.8	3,651.4	4,329.5	5,224.4	5,468.0	4.7%
Total spending on video (EUR m)	440.2	498.6	566.3	641.0	732.4	847.4	871.2	2.8%
Growth (%)		13.3%	13.6%	13.2%	14.3%	15.7%	2.8%	
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 (DKK m)	84.6	92.8	96.9	100.3	108.8	103.6	105.1	1.5%
Retail digital video (EUR m)	11.4	12.4	13.0	13.4	14.6	13.9	14.1	1.3%
Rental digital video (DKK m)	70.8	76.9	80.7	82.5	100.6	98.3	85.2	-13.3%
Rental digital video (EUR m)	9.5	10.3	10.8	11.1	13.5	13.2	11.4	-13.5%
Subscription digital video (DKK m)	1,684.0	2,166.0	2,685.0	3,258.3	3,933.4	4,859.1	5,137.7	5.7%
Subscription digital video (EUR m)	226.0	290.5	360.0	436.4	526.4	653.5	689.5	5.5%
Total digital video (DKK m)	1,839.5	2,335.8	2,862.5	3,441.1	4,142.8	5,061.0	5,327.9	5.3%
Total digital video (EUR m)	246.8	313.2	383.8	460.9	554.4	680.6	715.0	5.1%
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 (DKK m)	148.4	152.5	153.3	154.7	155.8	147.4	139.9	-5.1%
Pay TV TVOD (EUR m)	19.9	20.5	20.6	20.7	20.8	19.8	18.8	-5.3%
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 (DKK m)	56.2	32.2	18.5	11.1	6.9	4.2	2.5	-39.7%
Physical video rental (EUR m)	7.5	4.3	2.5	1.5	0.9	0.6	0.3	-39.9%
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 (DKK m)	278.8	212.7	199.3	178.4	158.9	139.4	118.7	-14.8%
Physical video retail (EUR m)	37.4	28.5	26.7	23.9	21.3	18.7	15.9	-15.0%
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 (DKK m)	335.1	244.9	217.8	189.6	165.9	143.6	121.3	-15.5%
Physical video software (EUR m)	45.0	32.8	29.2	25.4	22.2	19.3	16.3	-15.7%
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.*

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 2022

Digital video (OTT)
3.4%

Pay TV TVOD
12.8%

Physical retail
1.4%

Physical rental
1.1%

Average home entertainment spending

Spending per TV household (EURO)
€331.5

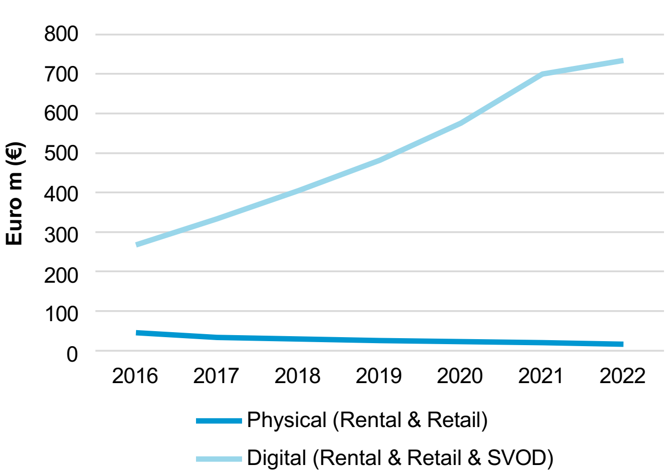
Spending per broadband household (EURO)
€386.9

Digital share of spend vs. broadband speed

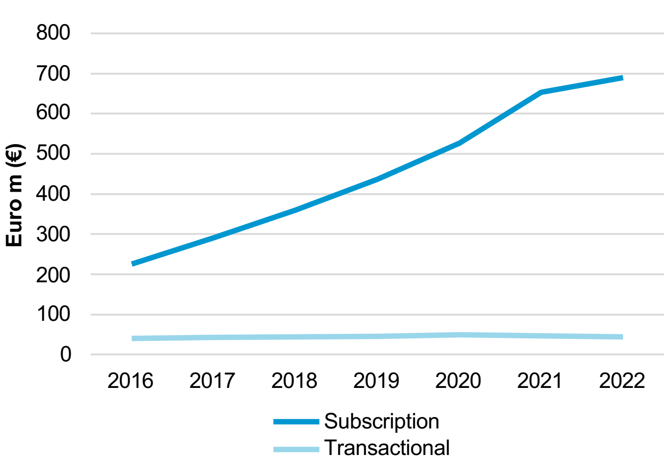
Share digital spend
97%

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