

# Finland

## Finland: key data

Population	5.3m
TV households	2.4m
DVD households (penetration)	58.4%
Blu-ray Disc household (penetration)	2.6%
<b>Distributor revenues from physical video software</b>	<b>€ 79m</b>
Comparison with 2009	-2.4%
DVD/Blu-ray Disc split	€ 70.8m / € 8.2m
Video software rental/retail split	12/88
<b>Consumer spending on physical video software</b>	<b>€ 147.7m</b>
Comparison with 2009	+12.4%
DVD/Blu-ray Disc split	€ 135m / € 12.7m
Video software rental/retail split	19/81

## DVD and Blu-ray market

DVD player penetration in Finland reached 58 per cent in 2010, the equivalent of 1.38 million households. The number of Blu-ray Disc (BD) player households was growing but the installed base was still marginal at just 61,000.

The Finnish video market came to a standstill in 2009 as the global economic downturn struck Finland. In 2010, however, the economy recovered and the video consumption habits gradually returned to normal. By the end of 2010, the Finnish video market was back on track.

## Retail

After a year of steep declines in 2009, Finnish DVD shipments to trade rose 5.1 per cent to 11.7 million in 2010. Although falling prices meant that distributor revenues from DVD retail fell 4.8 per cent to EUR 62.5 million, the annual rate of decline was much smaller than in 2009.

At consumer level, DVD unit sales increased by 14 per cent to 10.7 million units, returning the market to levels seen before 2009 and boosting consumer spending on DVD retail by 12 per cent to EUR 109.4 million.



After a year of very poor results for Blu-ray Discs, Finnish Blu-ray Disc sales performed again in line with European trends in 2010: sales were up by 99 per cent to 499,000 discs sold, while consumer spending on Blu-ray Disc was up 86 per cent to EUR 10.5 million.

## Rental

However, DVD and BD rental did not experience the same level of recovery that retail did in 2010, and continued the decline established in 2009. DVD rental shipments fell 8.9 per cent to 456,000 units. Combined with falling prices, this reduced distributor revenues from DVD rental by 15.8 per cent to EUR 8.2 million. At consumer level, the number of DVD rental transactions was down 7.5 per cent to 7.6m while spending fell 6.1 per cent to EUR 25.5 million.

## Online distribution

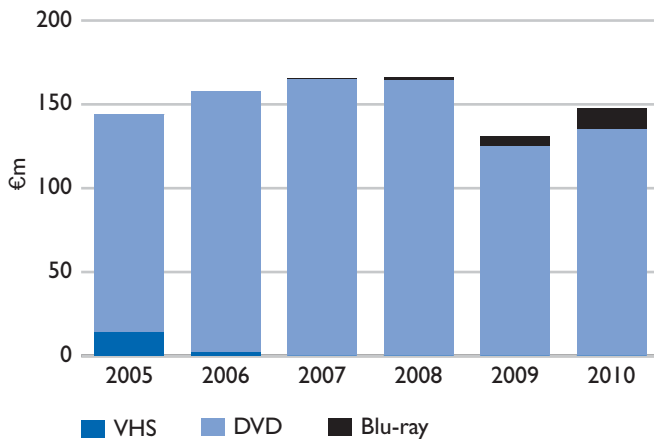
The largest Finnish cable-based VoD operators are Alcom and Elisa.

The major players in digital distribution services are: SF Anytime and services offered by the pay-TV operators Viasat (Viasat On-Demand) and Canal Plus (Filmnet Online).

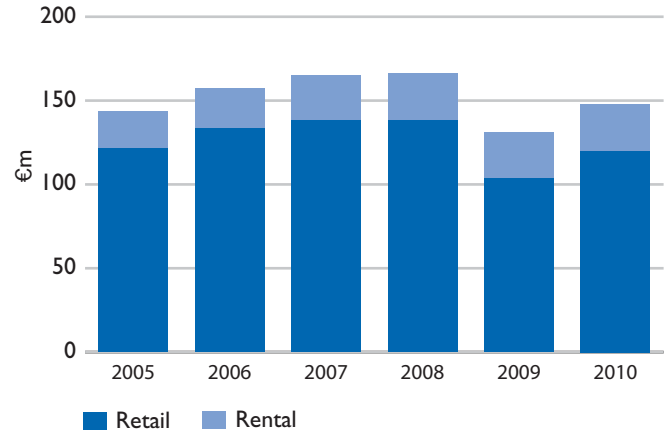
*This commentary was provided by IHS Screen Digest.*

## Video market: Finland

### Consumer spending by format



### Consumer spending by sector



		2005	2006	2007	2008	2009	2010	10/09
<b>EXCHANGE RATES</b>								
Exchange rate: \$1 =	Euro	0.80	0.80	0.73	0.68	0.72	0.75	
<b>GENERAL</b>								
Population	m	5.24	5.26	5.28	5.30	5.33	5.35	0.4%
Households	m	2.42	2.43	2.44	2.45	2.45	2.46	0.3%
<b>HARDWARE</b>								
TV households	m	2.4	2.3	2.3	2.3	2.4	2.4	0.7%
<b>DVD sector</b>								
DVD Video player/recorder households	m	0.8	1.0	1.2	1.2	1.3	1.4	3.3%
Penetration of TV households	%	34.3	43.2	50.3	52.9	56.9	58.4	
DVD console households	m	0.4	0.4	0.4	0.5	0.5	0.5	1.0%
Penetration of TV households	%	16.2	17.7	18.4	20.0	21.6	21.6	
<b>BD sector</b>								
BD standalone player households	m				0.015	0.042	0.061	46.4%
Penetration of TV households	%				0.644	1.784	2.593	
PS3 console households	m			0.027	0.067	0.110	0.155	40.8%
Penetration of TV households	%			1.2	2.9	4.7	6.5	

## Total video software market

		2005	2006	2007	2008	2009	2010	10/09
<b>TRADE LEVEL PHYSICAL VIDEO</b>								
Total revenues from video software	Euro m	80.9	86.9	90.4	92.0	80.9	79.0	-2.4%
Total revenues from retail video	Euro m	68.0	75.8	79.8	81.6	70.5	69.9	-0.8%
Total revenues from rental video	Euro m	12.9	11.1	10.5	10.4	10.5	9.1	-13.0%
<b>CONSUMER LEVEL PHYSICAL VIDEO</b>								
Total spending on video software	Euro m	143.8	157.7	165.3	166.1	131.4	147.7	12.4%
Total spending on retail video	Euro m	121.4	133.3	138.2	138.0	103.3	119.9	16.1%
Total spending on rental video	Euro m	22.4	24.4	27.0	28.1	28.0	27.7	-1.0%

## Video market: Finland

### Consumer level physical video

		2005	2006	2007	2008	2009	2010	10/09
<b>CONSUMER LEVEL DIGITAL VIDEO*</b>								
Total spending on digital video	Euro m	0.0	0.1	0.2	0.3	0.3	0.5	57.2%
<b>CONSUMER LEVEL TVVOD**</b>								
Total spending on TVVOD	Euro m	1.0	1.3	1.5	1.6	0.3	0.9	245.8%

\*The purchase or rental of movies and TV series delivered over the open internet through transactional models (also known as EST, DTO, Internet VOD) or on a subscription basis.

\*\*The delivery of movies and TV content on a transactional (VoD/NVoD/PPV) basis via cable/satellite/IPTV services.

### Retail video market

		2005	2006	2007	2008	2009	2010	10/09
Outlets stocking retail video	no	1,110	1,110	1,110	1,110	1,110	1,080	
Retail chains with 10 or more outlets	no	10	10	10	10	10	10	
Kiosks stocking retail video	no	420	420	420	420	420	410	
<b>Trade level: DVD retail</b>								
Revenues from retail DVD	Euro m	63.2	74.9	78.7	78.1	65.7	62.5	-4.8%
Retail DVD shipped to trade	m	8.7	10.6	12.0	12.6	11.1	11.7	5.1%
Average trade price	Euro	7.26	7.05	6.55	6.22	5.92	5.37	-9.4%
Number of titles released	no	843	1,022	1,388	1,290	1,388	1,388	
<b>Trade level: Blu-ray Disc retail</b>								
Revenues from retail BD	Euro m			0.826	3.457	4.787	7.398	54.5%
Retail BD shipped to trade	m			0.049	0.234	0.333	0.693	108.3%
Average trade price	Euro			16.76	14.75	14.38	10.67	-25.8%
<b>Consumer level: DVD retail</b>								
Average trade price	Euro			16.76	14.75	14.38	10.67	-25.8%
Retail DVDs sold to consumers								
Average consumer price	Euro	12.72	12.35	11.48	10.89	10.45	10.27	-1.8%
<b>Consumer level: Blu-ray Disc retail</b>								
Spending on retail BD	Euro m			0.256	1.181	5.626	10.500	86.7%
Retail BD sold to consumers	m			0.010	0.048	0.250	0.499	99.4%
Average consumer price	Euro			25.57	24.60	22.50	21.06	-6.4%

Rental video market

		2005	2006	2007	2008	2009	2010	10/09
<b>Video rental outlets</b>	no	800	800	800	780	780	730	
Rental chains with 10 or more outlets	no	4	4	4	4	4	4	
<b>Trade level: DVD rental</b>								
Revenues from rental DVD	Euro m	11.2	11.1	10.5	10.3	9.8	8.2	-15.8%
Rental DVD shipped to trade	m	0.414	0.474	0.519	0.482	0.500	0.456	-8.9%
Average trade price	Euro	27.00	23.37	20.31	21.38	19.57	18.08	-7.6%
Number of titles released	no	748	810	606	619	558	558	
<b>Trade level: BD rental</b>								
Revenues from rental BD	Euro m			0.004	0.112	0.659	0.851	29.1%
Rental BD shipped to trade	m			0.000	0.004	0.025	0.039	55.8%
Average trade price	Euro			25.63	28.66	26.65	22.08	-17.1%
Number of titles released	no			166	297	498	498	
<b>Consumer level: DVD rental</b>								
Spending on DVD rental	Euro m	18.7	24.4	27.0	27.7	27.2	25.5	-6.1%
DVD rental transactions	m	7.2	7.6	8.1	8.7	8.3	7.6	-7.5%
Average rental price	Euro	2.60	3.21	3.32	3.20	3.29	3.34	1.5%
<b>Consumer level: BD rental</b>								
Spending on BD rental	Euro m				0.336	0.841	2.219	163.9%
BD rental transactions	m				0.100	0.256	0.664	159.9%
Average rental price	Euro				3.36	3.36	3.35	-0.3%

Source: IHS Screen Digest/IVF

Population and household figures: Economist Intelligence Unit

Note: Distributor level excludes and consumer level includes VAT/sales tax