

Norway

Norway: key data

Population	5m
TV households	2.2m
DVD Video player/recorder penetration	80.9%
Blu-ray Disc player/recorders penetration	37.5%
Consumer spending on physical video software	Nkr 1.1bn / € 146.8m
Comparison with 2012 (local currency)	-38.1%
DVD/ Blu-ray Disc split	€ 113.6m / € 33.2m
Video software rental/retail split (%)	7 / 93
Consumer spending on digital video and TV VOD	Nkr 621.5m / € 79.6m
Comparison with 2012 (local currency)	84.4%
TVVOD/ Digital video split (%)	16 / 84



Rental

The Norwegian rental market in 2013 experienced a significant decline in spending of 58 per cent compared with 2012. Consumer spending on Blu-ray rental increased by 12 per cent, but despite this increase, it could not compensate for the important decline of DVD rental (67 per cent).

The Norwegian online rental market is growing, and this is considered to be the main reason for the strong contraction of the Norwegian physical rental market. Many rental shops have had to close down.

Retail

The Norwegian retail market contracted by 36 per cent in 2013. The market has seen a significant reduction of the sale of catalogue titles, and the main reason for this is considered to be the launch of online subscription services (e.g. Netflix).

Blu-ray is well established in the Norwegian market, and the number of Blu-ray players by household has increased by 30 per cent compared with 2012.

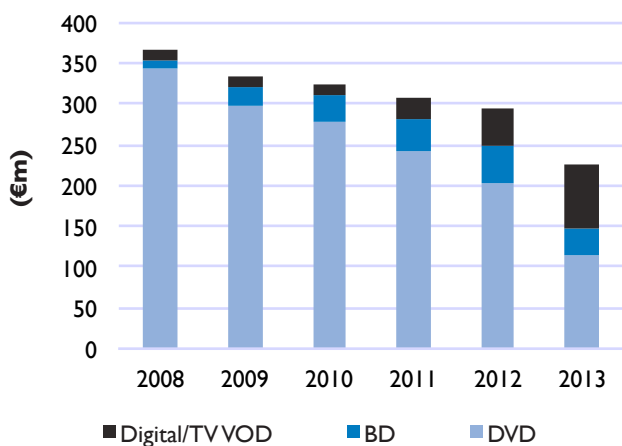
Other relevant developments

On 1st July, a series of amendments to Norway's Copyright Act, *Åndsverkloven*, came into effect, granting new powers for the enforcement of copyright. A major development is that right holders and their representatives are now able to collect IP addresses of suspected infringers, provided that they first inform the Norwegian data protection authority of their intention to collect this data. Right holders can then ask a court to have the identities revealed of those behind the IP addresses so that legal proceedings may be launched. Courts are also able to order the blocking of access to sites responsible for large-scale infringements of copyright.

This commentary was provided by the Norwegian Video Association.

Video market: Norway

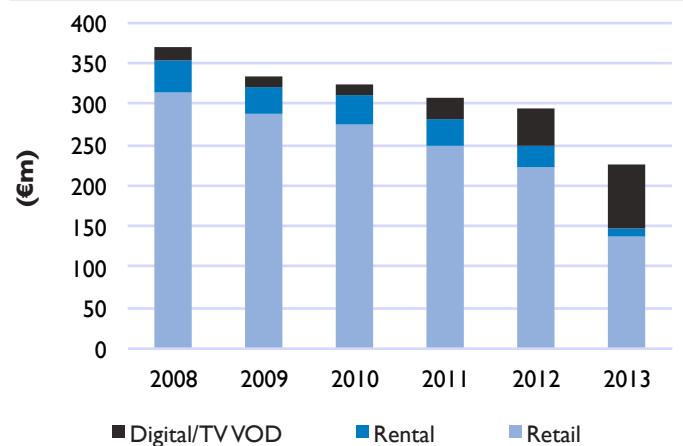
Consumer spending by format



Source: IHS/IVF/NVF/GfK/Film & Kino

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Consumer spending by sector



Source: IHS/IVF/NVF/GfK/Film & Kino

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		2008	2009	2010	2011	2012	2013	12/13
EXCHANGE RATES								
Exchange rate: Euro 1=	Nkr	8.30	8.77	8.01	7.80	7.47	7.80	
Exchange rate: \$1=	Nkr	5.64	6.29	6.04	5.61	5.82	5.88	
Exchange rate: \$1=	Euro	0.68	0.72	0.75	0.72	0.78	0.75	
GENERAL								
Population	m	4.8	4.8	4.9	4.9	4.9	5.0	0.7%
Households	m	2.1	2.2	2.2	2.2	2.2	2.2	0.9%
HARDWARE								
TV households	m	2.1	2.1	2.2	2.2	2.2	2.2	0.8%
DVD sector								
DVD Video player/recorder households	m	1.9	1.9	2.0	2.0	1.9	1.8	-5.1%
Penetration of TV households	%	90.0	90.0	92.0	94.0	85.9	80.9	-5.9%
DVD console households	m	0.8	0.9	1.0	1.0	0.9	0.7	-20.9%
Penetration of TV households	%	37.1	42.8	45.1	46.8	42.5	33.4	-21.6%
BD sector								
BD standalone player households	m	0.040	0.121	0.249	0.439	0.641	0.831	29.6%
Penetration of TV households	%	1.9	5.7	11.6	20.2	29.2	37.5	28.6%
PS3 console households	m	0.1	0.2	0.3	0.4	0.4	0.5	19.7%
Penetration of TV households	%	5.7	9.3	12.9	16.5	19.8	23.5	18.8%

Total video software market

		2008	2009	2010	2011	2012	2013	12/13
CONSUMER LEVEL ALL VIDEO								
<i>Total market figures include spending on both physical and digital video</i>								
Total spending on video	Nkr m	3,049.5	2,915.7	2,605.1	2,390.7	2,189.4	1,767.3	-19.3%
Total spending on video	Euro m	367.6	332.4	325.1	306.4	292.9	226.5	-22.7%

Video market: Norway

		2008	2009	2010	2011	2012	2013	12/13
CONSUMER LEVEL PHYSICAL VIDEO								
<i>Total market figures include spending on legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.</i>								
Total spending on video software	Nkr m	2,922.9	2,811.4	2,477.3	2,195.5	1,852.3	1,145.8	-38.1%
Total spending on video software	Euro m	352.4	320.5	309.2	281.4	247.8	146.8	-40.7%
Total spending on retail video	Nkr m	2,605.1	2,524.1	2,206.5	1,931.1	1,669.2	1,070.1	-35.9%
Total spending on retail video	Euro m	314.0	287.8	275.4	247.5	223.3	137.1	-38.6%
Total spending on rental video	Nkr m	317.8	287.2	270.8	264.4	183.2	75.8	-58.6%
Total spending on rental video	Euro m	38.3	32.7	33.8	33.9	24.5	9.7	-60.4%

		2008	2009	2010	2011	2012	2013	12/13
<i>Owing to a definitional change, digital video and TVVOD numbers may differ from those published in the 2012 IVF Yearbook.</i>								
CONSUMER LEVEL DIGITAL VIDEO								
<i>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.</i>								
Total spending on digital video	Nkr m	55.2	70.6	87.2	141.1	258.9	519.9	100.8%
Total spending on digital video	Euro m	6.6	8.0	10.9	18.1	34.6	66.6	92.4%

		2008	2009	2010	2011	2012	2013	12/13
CONSUMER LEVEL TV VOD								
<i>The delivery of movies and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services.</i>								
Total spending on TVVOD	Nkr m	71.4	33.8	40.6	54.2	78.1	101.6	30.0%
Total spending on TVVOD	Euro m	8.6	3.9	5.1	6.9	10.5	13.0	24.5%

Retail video market

		2008	2009	2010	2011	2012	2013	12/13
Outlets stocking retail video	no.	4,200	4,300	4,300	3,500			
Retail chains with 10 or more outlets	no.	10	4	4	4			
Kiosks stocking retail video	no.	410	410	410	350			

Consumer level: DVD retail

Spending on retail DVD	Nkr m	2,520.7	2,330.1	1,967.4	1,631.1	1,339.3	831.9	-37.9%
Spending on retail DVD	Euro m	303.9	265.7	245.5	209.0	179.2	106.6	-40.5%
Retail DVDs sold to consumers	m	22.7	21.7	17.6	14.9	13.0	7.9	-39.8%
Average consumer price	Nkr	110.91	107.41	111.60	109.31	102.65	105.85	3.1%
Average consumer price	Euro	13.37	12.25	13.93	14.01	13.73	13.57	-1.2%

Consumer level: BD retail

Spending on retail BD	Nkr m	79.0	194.0	239.1	300.0	329.9	238.2	-27.8%
Spending on retail BD	Euro m	9.5	22.1	29.8	38.4	44.1	30.5	-30.8%
Retail BDs sold to consumers	m	0.4	1.1	1.4	1.9	2.2	1.8	-15.1%
Average consumer price	Nkr	202.05	183.36	170.80	159.99	153.28	130.32	-15.0%
Average consumer price	Euro	24.36	20.90	21.32	20.50	20.51	16.70	-18.6%

Rental video market

		2008	2009	2010	2011	2012	2013	12/13
<i>Rental video market data includes both store-based rental and physical rent-by-mail operations where relevant.</i>								
Video rental outlets	no.	1,340	1,315	1,315	870			
Rental chains with 10 or more outlets	no.	5	5	5	4			
Consumer level: DVD rental								
Spending on DVD rental	Nkr m	316.7	283.3	263.0	249.3	164.5	54.8	-66.7%
Spending on DVD rental	Euro m	38.2	32.3	32.8	31.9	22.0	7.0	-68.1%
DVD rental transactions	m	9.0	8.2	7.6	7.3	4.8	1.5	-68.4%
Average rental price	Nkr	35.30	34.59	34.49	34.15	34.24	36.15	5.6%
Average rental price	Euro	4.26	3.94	4.30	4.38	4.58	4.63	1.1%
Consumer level: BD rental								
Spending on BD rental	Nkr m	1.10	3.93	7.82	15.15	18.66	20.97	12.3%
Spending on BD rental	Euro m	0.13	0.45	0.98	1.94	2.50	2.69	7.6%
BD rental transactions	m	0.03	0.10	0.20	0.39	0.55	0.58	6.4%
Average rental price	Nkr	38.54	38.44	38.99	39.13	34.24	36.15	5.6%
Average rental price	Euro	4.65	4.38	4.87	5.01	4.58	4.63	1.1%

Source: IHS/IIVF/INVF/GfK/Film & Kino

Population and household figures: IHS Global Insight

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

Note: Consumer level digital video and TVVOD figures may differ from locally published figures due to the application of different definitions.