

Sweden

Sweden: key data

Population	9.4m
TV households	4.6m
DVD households (penetration)	87.1%
Blu-ray households (penetration)	18.6%
Distributors revenues from video software	Skr 1.1bn / € 126.4m
Comparison with 2011 (local currency)	-9.4%
DVD/ Blu-ray Disc split	€ 101.7m / € 24.7m
Video software rental/retail split (%)	15/85
Consumer spending on video software	Skr 2.5bn / € 287.6m
Comparison with 2011 (local currency)	-8.2%
DVD/ Blu-ray Disc split	€ 249.2m / € 38.4m
Video software rental/retail split (%)	27/73
Consumer spending on digital video and TV VOD	Skr 337.7m / € 38.8m
Comparison with 2011 (local currency)	58.9%
Digital video/TV VOD split (%)	48 / 52



DVD and Blu-ray market

In 2012, consumer spending on physical video (DVD and Blu-ray) in Sweden reduced for a third consecutive year, with a 8.2 per cent reduction of spending compared to 2011. This trend was matched by another reduction of distributors' revenues, which decline by 9.4 cent in 2012 to Skr 1,100.8m.

Whereas DVD sales and rentals both declined in 2012, this was tempered by continued growth of the Blu-ray market, with consumer spending on Blu-ray rental increasing by 26.7 per cent compared to 2011. However, consumer spending on Blu-ray remains low, accounting for 13 per cent of the physical video market.

2012 also saw a rapid rise in the numbers of Blu-ray players in Swedish homes, with the number of Blu-ray player equipped households more than doubling from 6.8 per cent of households to 18.6 per cent. The number of households equipped with a PS3 console – also capable of Blu-ray playback – also increased, now totalling 12.2 per cent of Swedish households.

Online distribution

Swedish consumer spending on digital online content continues to demonstrate healthy growth, with a 130 per cent increase on 2011 to Skr 161.7m.

2012 also saw the introduction of a number of new market players in Sweden's SVOD market, with Netflix and Bonnier's Filmnet.se competing with Viasat's Viaplay service.

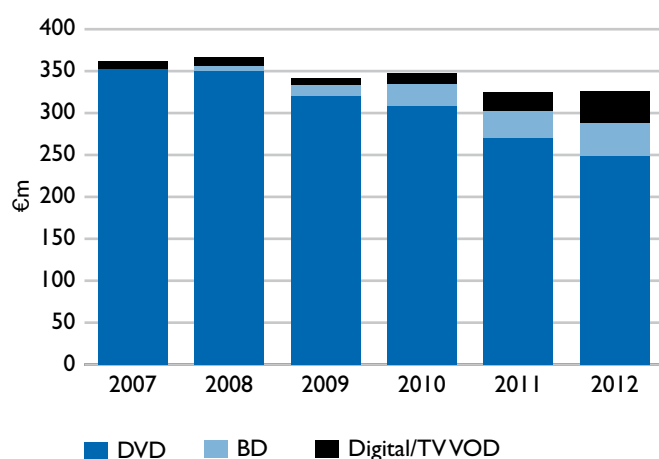
Other relevant developments

In April 2012, the European Court of Justice confirmed in a preliminary ruling that the Swedish implementation of the Enforcement Directive is not in conflict with EU data protection legislation. This followed a referral to the EU Court of a case brought against Swedish ISP, ePhone, by several publishers who had filed a request for information as provided for in the Swedish implementation of the Enforcement Directive. The request for information concerned the details of a user who had made several protected audiobooks available for download without authorization by the right holders. ePhone had refused to provide this information, claiming a conflict with EU data protection rules.

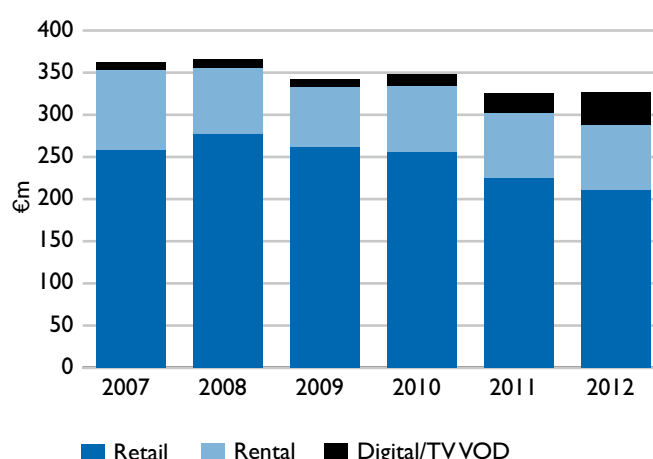
Following the preliminary ruling, the Swedish Supreme Court in December 2012 ordered ePhone to provide the requested details of the user. The decision paved the way for the Supreme Court to dismiss telecom company Telia's appeal against a 2010 ruling that it provide a number of film companies with details of the user responsible for the torrent site swetorrents.org.

This commentary was provided by the SVF, the Swedish Video Association.

Consumer spending by format



Consumer spending by sector



		2007	2008	2009	2010	2011	2012	12/11
EXCHANGE RATES								
Exchange rate: Euro =	Skr	9.25	9.63	10.63	9.56	9.04	8.71	
Exchange rate: \$ =	Skr	6.76	6.58	7.65	7.21	6.49	6.77	
Exchange rate: \$ =	Euro	0.73	0.68	0.72	0.75	0.72	0.78	
GENERAL								
Population	m	9.2	9.2	9.2	9.3	9.3	9.4	0.4%
Households	m	4.5	4.5	4.5	4.6	4.6	4.6	0.7%
HARDWARE								
TV households	m	4.4	4.4	4.5	4.5	4.6	4.6	0.9%
DVD sector								
DVD Video player/recorder households	m	3.493	3.820	4.029	4.131	4.171	4.022	-3.6%
Penetration of TV households	%	79.6	86.1	89.8	91.2	91.2	87.1	
DVD console households	m	0.692	0.788	0.887	0.927	0.978	0.932	-4.7%
Penetration of TV households	%	15.8	17.8	19.8	20.5	21.4	20.2	
BD sector								
BD standalone player households	m	0.0	0.029	0.102	0.225	0.310	0.857	176.6%
Penetration of TV households	%	0.2	0.7	2.3	5.0	6.8	18.6	
PS3 console households	m	0.1	0.154	0.255	0.359	0.465	0.561	20.7%
Penetration of TV households	%	1.4	3.5	5.7	7.9	10.2	12.2	

Total video software market

		2007	2008	2009	2010	2011	2012	12/11
CONSUMER LEVEL ALL VIDEO								
<i>Total market figures include spending on both physical and digital video</i>								
Total spending on all video	Skr m	3,355.8	3,526.1	3,635.2	3,323.9	2,940.6	2,842.9	-3.3%
Total spending on all video	Euro m	362.7	366.3	342.0	347.8	325.4	326.4	0.3%

Total video software market

		2007	2008	2009	2010	2011	2012	12/11
TRADE LEVEL PHYSICAL VIDEO								
<i>Total market figures include revenues from legacy formats not broken out separately (eg,VHS, HD-DVD, UMD) where relevant.</i>								
Total revenues from video software	Skr m	1,878.8	1,707.5	1,609.0	1,505.3	1,214.9	1,100.8	-9.4%
Total revenues from video software	Euro m	203.1	177.5	152.0	157.5	134.4	126.4	-6.0%
Total revenues from retail video	Skr m	1,587.8	1,467.7	1,399.9	1,291.2	1,027.6	930.6	-9.4%
Total revenues from retail video	Euro m	171.6	152.5	131.7	135.1	113.7	106.8	-6.0%
Total revenues from rental video	Skr m	291.0	239.9	209.1	214.1	187.3	170.1	-9.2%
Total revenues from rental video	Euro m	31.5	25.1	20.3	22.4	20.7	19.5	-5.7%

		2007	2008	2009	2010	2011	2012	12/11
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	Skr m	3,268.6	3,421.4	3,533.8	3,193.4	2,728.1	2,505.2	-8.2%
Total spending on video software	Euro m	353.2	355.4	332.5	334.2	301.9	287.6	-4.7%
Total spending on retail video	Skr m	2,393.1	2,666.6	2,780.3	2,440.8	2,027.1	1,838.2	-9.3%
Total spending on retail video	Euro m	258.6	277.0	261.6	255.4	224.3	211.0	-5.9%
Total spending on rental video	Skr m	875.5	754.8	753.6	752.6	701.0	667.0	-4.9%
Total spending on rental video	Euro m	94.6	78.4	70.9	78.8	77.6	76.6	-1.3%

		2007	2008	2009	2010	2011	2012	12/11
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, InternetVOD) or on a subscription basis.</i>								
Total spending on digital video	Skr m	11.7	16.5	20.4	29.6	70.2	161.7	130.3%
Total spending on digital video	Euro m	1.3	1.7	1.9	3.1	7.8	18.6	138.9%

		2007	2008	2009	2010	2011	2012	12/11
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	Skr m	75.6	88.3	81.0	100.8	142.3	176.0	23.6%
Total spending on TVVOD	Euro m	8.2	9.2	7.6	10.6	15.7	20.2	28.3%

Retail video market

		2007	2008	2009	2010	2011	2012	12/11
Outlets stocking retail video	no	4,800	4,600	4,600	4,200			
Retail chains with 10 or more outlets	no	10	10	10	9			
Kiosks stocking retail video	no							

Trade level: DVD retail								
Revenues from retail DVD	Skr m	1,568.9	1,406.1	1,296.2	1,134.4	876.6	740.2	-15.6%
Revenues from retail DVD	Euro m	169.6	146.1	121.9	118.7	97.0	85.0	-12.4%
Retail DVD units shipped to trade	m	35.6	36.3	33.3	21.2	18.4	15.9	-13.6%
Average trade price	Skr	44.07	38.70	38.98	53.45	47.62	46.55	-2.2%
Average trade price	Euro	4.76	4.02	3.67	5.59	5.27	5.34	1.4%
Number of titles released	no	1,388	2,005	2,800	2,500	2,200		

Trade level: BD retail								
Revenues from retail BD	Skr m	15.8	59.8	103.7	156.8	151.1	190.4	26.1%
Revenues from retail BD	Euro m	1.7	6.210	9.8	16.4	16.7	21.9	30.8%
Retail BD units shipped to trade	m	0.1	0.471	1.0	1.6	1.5	2.1	35.7%
Average trade price	Skr	133.17	126.87	108.46	97.46	98.22	91.21	-7.1%
Average trade price	Euro	14.39	13.18	10.20	10.20	10.87	10.47	-3.7%
Number of titles released	no.			160	290	490	490	

Retail video market

		2007	2008	2009	2010	2011	2012	12/11
Consumer level: DVD retail								
Spending on retail DVD	Skr m	2,381.3	2,620.0	2,670.0	2,245.0	1,808.6	1,589.5	-12.1%
Spending on retail DVD	Euro m	257.4	272.2	251.2	234.9	200.1	182.5	-8.8%
Retail DVDs sold to consumers	m	25.1	27.5	26.8	21.4	18.3	16.5	-9.4%
Average consumer price	Skr	95.02	95.45	99.55	104.71	99.10	96.18	-2.9%
Average consumer price	Euro	10.27	9.91	9.37	10.96	10.97	11.04	0.7%
Consumer level: BD retail								
Spending on retail BD	Skr m	9.7	46.6	110.3	195.8	218.5	248.8	13.8%
Spending on retail BD	Euro m	1.0	4.836	10.4	20.5	24.2	28.6	18.1%
Retail BDs sold to consumers	m	0.0	0.197	0.6	1.2	1.4	1.8	29.8%
Average consumer price	Skr	236.59	236.71	182.55	163.10	153.39	134.56	-12.3%
Average consumer price	Euro	25.57	24.59	17.17	17.07	16.98	15.45	-9.0%

Rental video market

		2007	2008	2009	2010	2011	2012	12/11
<i>Rental video market data includes both store-based rental and physical rent-by-mail operations where relevant.</i>								
Video rental outlets	no	750	600	600	570	560	550	-1.8%
Rental chains with 10 or more outlets	no	5	4	4	3	3	3	

Trade level: DVD rental								
Revenues from rental DVD	Skr m	291.0	239.9	209.1	193.4	166.3	145.6	-12.5%
Revenues from rental DVD	Euro m	31.4	24.9	19.7	20.2	18.4	16.7	-9.2%
Rental DVD units shipped to trade	m	3.5	2.2	2.4	2.6	2.4	2.2	-12.2%
Average trade price	Skr	83.90	108.79	85.93	75.53	67.89	67.70	-0.3%
Average trade price	Euro	9.07	11.30	8.08	7.90	7.51	7.77	3.5%
Number of titles released	no	606	613	552	547	490		

Trade level: BD rental								
Revenues from rental BD	Skr m	0	1.53	7.1	20.8	21.0	24.6	17.1%
Revenues from rental BD	Euro m	0.01	0.16	0.7	2.2	2.3	2.8	21.4%
Rental BD units shipped to trade	m	0	0.028	0.12	0.26	0.34	0.36	7.2%
Average trade price	Skr	24	55.09	59.43	79.99	61.99	67.70	9.2%
Average trade price	Euro	2.64	5.72	5.59	8.37	6.86	7.77	13.3%
Number of titles released	no	160	290	490	490	417		

Consumer level: DVD rental								
Spending on DVD rental	Skr m	875.0	753.8	734.0	698.6	630.5	580.8	-7.9%
Spending on DVD rental	Euro m	94.6	78.3	69.1	73.1	69.8	66.7	-4.4%
DVD rental transactions	m	25.8	24.5	23.9	22.5	20.7	17.9	-13.5%
Average rental price	Skr	33.92	30.77	30.67	31.01	30.50	32.49	6.5%
Average rental price	Euro	3.67	3.20	2.89	3.24	3.38	3.73	10.5%

Consumer level: BD rental								
Spending on BD rental	Skr m	0.50	1.1	19.5	54.0	70.5	86.1	22.1%
Spending on BD rental	Euro m	0.05	0.110	1.839	5.7	7.8	9.9	26.7%
BD rental transactions	m	0.01	0.031	0.571	1.571	2.040	2.485	21.8%
Average rental price	Skr	33.92	34.34	34.20	34.37	34.57	34.66	0.3%
Average rental price	Euro	3.67	3.57	3.22	3.60	3.83	3.98	4.0%

Source: IHS/IVF/SVF

Population and household figures: IHS Global Insight

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

DVD retail top 10

Rank	Title	Distributor	Genre
1	Jack Reacher	Paramount Pictures	Thriller/Action
2	Mammas Pojkar	Walt Disney	Comedy
3	Sune I Grekland	Nordisk Film	Comedy
4	Zambezia	Scanbox	Family - Animated
5	Hobbit En Öväntad Resa	Svensk Film	Adventure
6	Berättelsen Om Pi	Svensk Film	Adventure
7	De Fem Legenderna	Paramount Pictures	Family - Animated
8	Hobbit En Öväntad Resa	Svensk Film	Adventure
9	En Öväntad Vänskap	Scanbox	Comedy
10	Breaking Dawn Part 2	Nordisk Film	Science Fiction/ Horror

Source: Sveriges Videodistributörers Förening (SVF)

Notes: 1. Ranking based on retail sales by volume

2. Units sold based on available data

Blu-ray Disc retail top 10

Rank	Title	Distributor	Genre
1	Jack Reacher	Paramount Pictures	Thriller/Action
2	Hobbit En Öväntad Resa	Svensk Film	Adventure
3	Berättelsen Om Pi	Svensk Film	Adventure
4	Mammas Pojkar	Walt Disney	Comedy
5	Berättelsen Om Pi	Svensk Film	Adventure
6	Sune I Grekland	Nordisk Film	Comedy
7	Hobbit En Öväntad Resa 3D	Svensk Film	Adventure
8	De Fem Legenderna	Paramount Pictures	Family - Animated
9	Expendables 2 - Back For War	Noble	Thriller/Action
10	Looper	Noble	Thriller/Action

Source: Sveriges Videodistributörers Förening (SVF)

Notes: 1. Ranking based on retail sales by volume

2. Units sold based on available data

Combined DVD & Blu-ray Disc rental top 10

Rank	Title	Distributor	Genre
1	Argo	Warner Bros.	Drama
2	En Öväntad Vänskap	Scanbox	Comedy
3	Killing Them Softly	Noble	Thriller/Action
4	Bröllop I Italien	Nordisk Film	Comedy
5	James Bond - Skyfall	Sf Film	Thriller/Action
6	Blondie	Nordisk Film	Drama
7	Asterix & Obelix Och Britterna	Noble	Adventure
8	Hypnotisören	Sf Film	Thriller/Action
9	Trouble With The Curve	Warner Bros.	Comedy
10	Taken 2	Scanbox	Thriller/Action

Source: Sveriges Videodistributörers Förening (SVF)

Notes: 1. Ranking based on retail sales by volume

2. Units sold based on available data