

Sweden

Sweden: key data

Population	9.4m
TV households	4.7m
DVD Video player/recorder penetration	91.1%
Blu-ray Disc player/recorders penetration	8.1%
Consumer spending on physical video software	Skr 1.9bn / € 220.2m
Comparison with 2012 (local currency)	-18.3%
DVD/ Blu-ray Disc split	€ 181.4m / € 38.8m
Video software rental/retail split (%)	30 / 70
Consumer spending on digital video and TV VOD	Skr 737.4m / € 85.2m
Comparison with 2012 (local currency)	113.9%
TVVOD/ Digital video split (%)	27 / 73



2013 represented another year of transformation for Sweden's video market as continued reductions in consumer spending on physical video were increasingly compensated by the growing popularity of digital video formats. The rise of the digital video market meant that the overall decline in consumer spending slowed considerably compared to previous years, with the market totalling Skr 2,642.7m in 2013, which represents a small decrease of 1.7 per cent compared to 2012.

DVD and Blu-ray market

Physical video (DVD and Blu-ray) continues to account for the majority of Sweden's video market, representing 69.4 per cent of total consumer spending in 2013. However, the declines in spending on physical video continued for the fourth consecutive year in 2013, falling by 18.3 per cent compared to 2012 to Skr 1,905.3m, and significantly reducing its share of the market.

For the first time since the release of the format, there was also a decline in consumer spending on retail Blu-ray in 2013. Consumer spending on retail Blu-ray stood at Skr 226.3m in 2013, an 8.9 per cent reduction on 2012, whereas DVD retail spending reduced by 25.2 per cent to Skr 1105.1m. Of the physical video markets, only Blu-ray rental experienced growth in 2013, rising by 26.3 per cent. However, at Skr 109.37 Blu-ray rental represents a relatively small 5.7 per cent of the physical market.

Online distribution

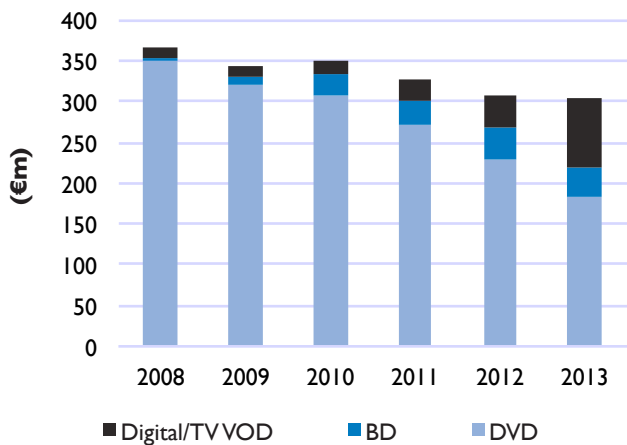
Sweden's digital video market demonstrated strong growth for another year in 2013, increasing by 181.8 per cent to reach Skr 601.6m. Notably, 2013 was the first full year of operation for recent SVOD market entrants Netflix and Filmnet in Sweden. Meanwhile, Amazon's Lovefilm announced its withdrawal from Sweden in June 2013 after several years' presence on the physical and digital rental markets.

Other relevant developments

In January 2013, Sweden's Supreme Court confirmed that the Swedish ISP Telia must provide a number of Swedish right holders with details of the user responsible for the file-sharing site Swetorrents.org. The decision followed a preliminary ruling on the right of information which was delivered by the Court of Justice of the European Union in April 2012. This ruling confirmed that Sweden's implementation of the IPR Enforcement Directive is not in conflict with EU data protection regulation, and that an ISP may be ordered in civil proceedings to give a copyright holder or its representative information on the subscriber to whom the ISP provided an IP address which was allegedly used in an infringement.

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

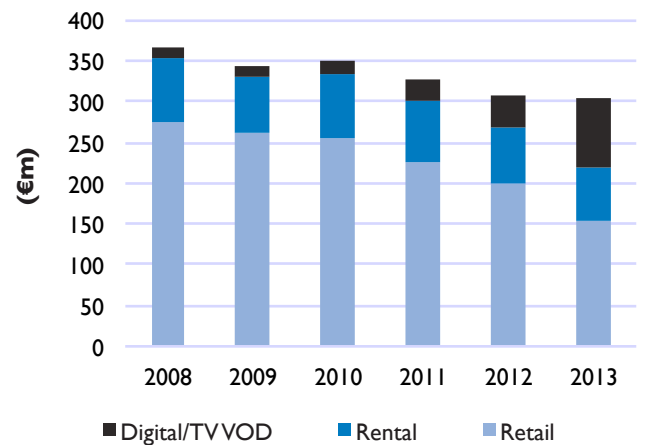
Consumer spending by format



Source: IHS/IVF/SVF

© 2014 IHS

Consumer spending by sector



Source: IHS/IVF/SVF

© 2014 IHS

		2008	2009	2010	2011	2012	2013	12/13
EXCHANGE RATES								
Exchange rate: Euro =	Skr	9.69	10.68	9.56	9.04	8.71	8.65	
Exchange rate: \$ =	Skr	6.59	7.65	7.21	6.50	6.78	6.51	
Exchange rate: \$ =	Euro	0.68	0.72	0.75	0.72	0.78	0.75	
GENERAL								
Population	m	9.2	9.2	9.3	9.3	9.4	9.4	0.4%
Households	m	4.5	4.5	4.6	4.6	4.6	4.7	0.7%
HARDWARE								
TV households	m	4.4	4.5	4.5	4.6	4.6	4.7	0.8%
DVD sector								
DVD Video player/recorder households	m	3.8	4.0	4.1	4.2	4.2	4.2	0.6%
Penetration of TV households	%	86.1	89.8	91.2	91.3	91.3	91.1	-0.2%
DVD console households	m	0.8	0.9	0.9	1.0	0.9	0.8	-14.9%
Penetration of TV households	%	17.8	19.8	20.5	21.4	20.2	17.0	-15.7%
BD sector								
BD standalone player households	m	0.029	0.102	0.225	0.310	0.363	0.378	4.1%
Penetration of TV households	%	0.7	2.3	5.0	6.8	7.9	8.1	3.3%
PS3 console households	m	0.15	0.25	0.36	0.46	0.56	0.67	19.6%
Penetration of TV households	%	3.5	5.7	7.9	10.2	12.2	14.4	18.6%

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	Skr m	3,536.6	3,649.5	3,332.5	2,942.0	2,676.8	2,642.7	-1.3%
Total spending on video	Euro m	364.8	341.9	348.8	325.4	307.5	305.5	-0.7%

Video market: Sweden

		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	Skr m	3,421.4	3,533.8	3,193.4	2,728.1	2,332.1	1,905.3	-18.3%
Total spending on video software	Euro m	352.9	331.0	334.2	301.7	267.9	220.2	-17.8%
Total spending on retail video	Skr m	2,666.6	2,780.3	2,440.8	2,027.1	1,726.6	1,331.4	-22.9%
Total spending on retail video	Euro m	275.1	260.4	255.4	224.2	198.3	153.9	-22.4%
Total spending on rental video	Skr m	754.8	753.6	752.6	701.0	605.5	573.9	-5.2%
Total spending on rental video	Euro m	77.9	70.6	78.8	77.5	69.6	66.3	-4.6%

		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	Skr m	17.9	22.3	31.8	72.7	164.1	540.3	229.4%
Total spending on digital video	Euro m	1.8	2.1	3.3	8.0	18.8	62.5	231.4%

		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	Skr m	97.4	93.4	107.3	141.3	180.6	197.0	9.1%
Total spending on TVVOD	Euro m	10.0	8.7	11.2	15.6	20.7	22.8	9.8%

Retail video market

		2008	2009	2010	2011	2012	2013	12/13
Outlets stocking retail video	no.	4,600	4,600	4,200				
Retail chains with 10 or more outlets	no.	10	10	9				
Kiosks stocking retail video	no.							

		2008	2009	2010	2011	2012	2013	12/13
Consumer level: DVD retail								
Spending on retail DVD	Skr m	2,620.0	2,670.0	2,245.0	1,808.6	1,478.4	1,105.1	-25.2%
Spending on retail DVD	Euro m	270.3	250.1	235.0	200.0	169.8	127.7	-24.8%
Retail DVDs sold to consumers	m	27.5	26.8	21.4	18.3	16.2	13.1	-19.0%
Average consumer price	Skr	95.4	99.6	104.7	99.1	91.1	84.1	-7.7%
Average consumer price	Euro	9.85	9.33	10.96	10.96	10.46	9.72	-7.2%

		2008	2009	2010	2011	2012	2013	12/13
Consumer level: BD retail								
Spending on retail BD	Skr m	46.6	110.3	195.8	218.5	248.2	226.3	-8.9%
Spending on retail BD	Euro m	4.8	10.3	20.5	24.2	28.5	26.2	-8.3%
Retail BDs sold to consumers	m	0.2	0.6	1.2	1.4	1.8	1.9	4.2%
Average consumer price	Skr	236.7	182.5	163.1	153.4	134.2	117.4	-12.5%
Average consumer price	Euro	24.42	17.10	17.07	16.96	15.42	13.57	-12.0%

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.	600	600	570	560	550		
Rental chains with 10 or more outlets	no.	4	4	3	3	3		
Consumer level: DVD rental								
Spending on DVD rental	Skr m	753.8	734.0	698.6	630.5	518.9	464.5	-10.5%
Spending on DVD rental	Euro m	77.8	68.8	73.1	69.7	59.6	53.7	-9.9%
DVD rental transactions	m	24.5	23.9	22.5	20.7	16.4	13.7	-16.3%
Average rental price	Skr	30.8	30.7	31.0	30.5	31.6	33.8	6.9%
Average rental price	Euro	3.17	2.87	3.25	3.37	3.63	3.91	7.6%
Consumer level: BD rental								
Spending on BD rental	Skr m	1.06	19.54	54.02	70.52	86.62	109.37	26.3%
Spending on BD rental	Euro m	0.11	1.83	5.65	7.80	9.95	12.64	27.1%
BD rental transactions	m	0.03	0.57	1.57	2.04	2.49	2.88	15.7%
Average rental price	Skr	34.3	34.2	34.4	34.6	34.8	38.0	9.2%
Average rental price	Euro	3.54	3.20	3.60	3.82	4.00	4.39	9.9%

Source: IHS/IIVF/SVF

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.