

# Sweden

## Sweden: key data

Population	9.3m
TV households	4.6m
DVD Video player/recorder	91.2%
Blu-ray Disc player/recorders penetration	6.8%
<b>Distributor revenues from physical video software</b>	Skr 1.2bn / € 134.4m
Comparison with 2010 (local currency)	-19.3%
DVD/ Blu-ray Disc split	€ 115.4m / € 19m
Video software rental/retail split (%)	15 / 85
<b>Consumer spending on physical video software</b>	Skr 2.7bn / € 296.5m
Comparison with 2010 (local currency)	-15.9%
DVD/ Blu-ray Disc split	€ 264.3m / € 32.1m
Video software rental/retail split (%)	25 / 75
<b>Consumer spending on digital video and TV VOD</b>	Skr 249.7m / € 27.6m
Comparison with 2010 (local currency)	61%
Digital video/TV VOD split (%)	82 / 18



## DVD and Blu-ray market

In 2011, the video market in Sweden declined in terms of distributors' revenues by 19.3 per cent. Consumer spending on video software declined for a second year in the row by 15.9 per cent.

On the other hand, the Blu-ray retail and rental market continued to performed well in 2011. The number of Blu-ray players and PS3 consoles increased substantially.

The Blu-ray rental market is growing healthily in Sweden and rental transactions of Blu-ray discs increased by close to 30 per cent.

Spending on retail Blu-ray increased by 11 per cent, with prices remaining stable.

## Online distribution

EST/VoD is performing well on the Swedish home entertainment market and is showing significant growth.

The Apple iTunes Store was launched in Sweden in 2011, offering multiple rental and retail choices to the Swedish consumer. There are a number of other significant players on the Swedish online market, including local SF Anytime.

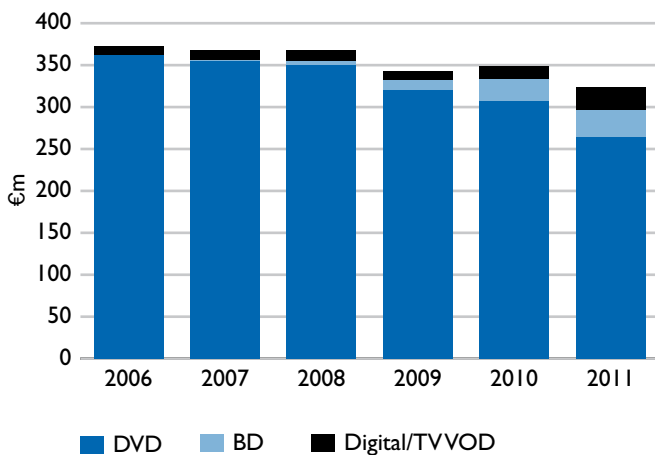
## Other relevant developments

Studies show that less and less new films are released onto the Swedish home entertainment market over the last 2-3 years. The action/thriller genre which enjoys a large share of the Swedish market is most affected by this development. Other reasons for the declining home entertainment market are the general uncertain economic situation, as well as the easy availability of illegal content on the Internet.

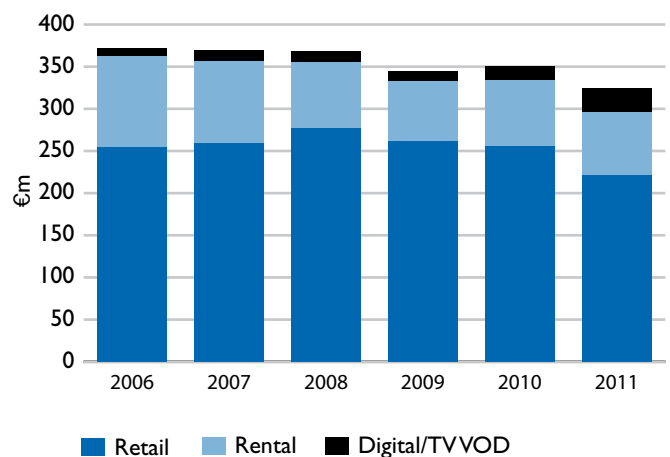
The Enforcement Directive was implemented in Sweden in 2009. The legislation provides authors and copyright owners with the opportunity to use the courts to seek subscriber information for suspected file sharers. However, this provision was immediately challenged in court when applied by right holders.

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

Consumer spending by format



Consumer spending by sector



		2006	2007	2008	2009	2010	2011	10/11
<b>EXCHANGE RATES</b>								
Exchange rate: Euro   =	Skr	9.26	9.25	9.63	10.63	9.56	9.04	
Exchange rate: \$   =	Skr	7.37	6.76	6.58	7.65	7.21	6.49	
Exchange rate: \$   =	Euro	0.80	0.73	0.68	0.72	0.75	0.72	
<b>GENERAL</b>								
Population	m	9.1	9.2	9.2	9.2	9.3	9.3	0.5%
Households	m	4.4	4.5	4.5	4.5	4.6	4.6	0.8%
<b>HARDWARE</b>								
TV households	m	4.3	4.4	4.4	4.5	4.5	4.6	1.0%
<b>DVD sector</b>								
DVD Video player/recorder households	m	3.0	3.5	3.8	4.0	4.1	4.2	1.0%
Penetration of TV households	%	69.1	79.6	86.1	89.8	91.2	91.2	
DVD console households	m	0.6	0.7	0.8	0.9	0.9	1.0	5.5%
Penetration of TV households	%	14.9	15.8	17.8	19.8	20.5	21.4	
<b>BD sector</b>								
BD standalone player households	m		0.007	0.029	0.102	0.225	0.310	37.8%
Penetration of TV households	%		0.2	0.7	2.3	5.0	6.8	
PS3 console households	m		0.06	0.15	0.25	0.36	0.46	28.5%
Penetration of TV households	%		1.4	3.5	5.7	7.9	10.1	

Total video software market

		2006	2007	2008	2009	2010	2011	10/11
<b>TRADE LEVEL PHYSICAL VIDEO</b>								
<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	1,779.6	1,878.9	1,709.0	1,616.2	1,505.3	1,214.9	-19.3%
Total revenues from video software	Euro m	192.2	203.1	177.5	152.0	157.5	134.4	-14.6%
Total revenues from retail video	Skr m	1,439.5	1,587.8	1,467.7	1,399.9	1,291.2	1,027.6	-20.4%
Total revenues from retail video	Euro m	155.5	171.6	152.5	131.7	135.1	113.7	-15.8%
Total revenues from rental video	Skr m	340.2	291.0	241.4	216.2	214.1	187.3	-12.5%
Total revenues from rental video	Euro m	36.7	31.5	25.1	20.3	22.4	20.7	-7.5%

## Video market: Sweden

		2006	2007	2008	2009	2010	2011	10/11
<b>CONSUMER LEVEL PHYSICAL VIDEO</b>								
<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	3,351.4	3,296.6	3,418.2	3,530.7	3,187.2	2,678.9	-15.9%
Total spending on video software	Euro m	362.0	356.3	355.1	332.2	333.5	296.5	-11.1%
Total spending on retail video	Skr m	2,347.4	2,393.1	2,667.2	2,780.7	2,442.1	1,997.6	-18.2%
Total spending on retail video	Euro m	253.5	258.6	277.1	261.6	255.6	221.1	-13.5%
Total spending on rental video	Skr m	1,004.0	903.5	751.1	750.0	745.0	681.4	-8.5%
Total spending on rental video	Euro m	108.4	97.6	78.0	70.6	78.0	75.4	-3.3%

		2006	2007	2008	2009	2010	2011	10/11
<b>CONSUMER LEVEL DIGITAL VIDEO</b>								
<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	3.3	4.4	7.3	9.8	20.1	44.5	121.7%
Total spending on digital video	Euro m	0.4	0.5	0.8	0.9	2.1	4.9	134.4%

		2006	2007	2008	2009	2010	2011	10/11
<b>CONSUMER LEVEL TV VOD</b>								
<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	89.8	103.6	117.6	104.1	135.0	205.3	52.0%
Total spending on TVVOD	Euro m	9.7	11.2	12.2	9.8	14.1	22.7	60.8%

## Retail video market

		2006	2007	2008	2009	2010	2011	10/11
Outlets stocking retail video	no.	5,000	4,800	4,600	4,600	4,200		
Retail chains with 10 or more outlets	no.	10	10	10	10	9		
Kiosks stocking retail video	no.							

### Trade level: DVD retail

Revenues from retail DVD	Skr m	1,439.5	1,568.9	1,406.1	1,296.2	1,134.4	876.6	-22.7%
Revenues from retail DVD	Euro m	155.5	169.6	146.1	121.9	118.7	97.0	-18.3%
Retail DVD units shipped to trade	m	28.4	35.6	36.3	33.3	21.2	18.4	-13.3%
Average trade price	Skr	50.7	44.1	38.7	39.0	53.5	47.6	-10.9%
Average trade price	Euro	5.47	4.76	4.02	3.67	5.59	5.27	-5.8%
Number of titles released	no.	1,022	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	-3.6%
Revenues from retail BD	Euro m		1.7	6.2	9.8	16.4	16.7	1.9%
Retail BD units shipped to trade	m		0.119	0.471	1.0	1.6	1.5	-4.4%
Average trade price	Skr		133.2	126.9	108.5	97.5	98.2	0.8%
Average trade price	Euro		14.39	13.18	10.20	10.20	10.87	6.6%
Number of titles released	no.			160	290	490	490	

### Consumer level: DVD retail

Spending on retail DVD	Skr m	2,347.4	2,381.3	2,620.0	2,670.0	2,245.0	1,778.6	-20.8%
Spending on retail DVD	Euro m	253.5	257.4	272.2	251.2	234.9	196.8	-16.2%
Retail DVDs sold to consumers	m	20.6	25.1	27.5	26.8	21.4	17.8	-17.2%
Average consumer price	Skr	114.0	95.0	95.4	99.6	104.7	100.2	-4.3%
Average consumer price	Euro	12.31	10.27	9.91	9.37	10.96	11.09	1.2%

### Consumer level: BD retail

Spending on retail BD	Skr m		9.7	47.2	110.7	197.1	219.0	11.1%
Spending on retail BD	Euro m		1.0	4.9	10.4	20.6	24.2	17.5%
Retail BDs sold to consumers	m		0.041	0.199	0.6	1.2	1.4	18.3%
Average consumer price	Skr		236.6	236.9	191.7	163.2	153.2	-6.1%
Average consumer price	Euro		25.57	24.61	18.03	17.08	16.96	-0.7%

## Rental video market

		2006	2007	2008	2009	2010	2011	10/11
<i>Rental video market data includes both store-based rental and physical rent-by-mail operations where relevant.</i>								
Video rental outlets	no.	800	750	600	600	570	560	
Rental chains with 10 or more outlets	no.	5	5	4	4	3	3	
<b>Trade level: DVD rental</b>								
Revenues from rental DVD	Skr m	340.2	291.0	239.9	209.1	193.4	166.3	-14.0%
Revenues from rental DVD	Euro m	36.7	31.4	24.9	19.7	20.2	18.4	-9.1%
Rental DVD units shipped to trade	m	2.5	3.5	2.2	2.4	2.6	2.4	-4.3%
Average trade price	Skr	137.5	83.9	108.8	85.9	75.5	67.9	-10.1%
Average trade price	Euro	14.85	9.07	11.30	8.08	7.90	7.51	-4.9%
Number of titles released	no.	810	606	613	552	547	490	
<b>Trade level: BD rental</b>								
Revenues from rental BD	Skr m		0.056	1.528	7.13	20.75	20.98	1.1%
Revenues from rental BD	Euro m		0.006	0.159	0.67	2.17	2.32	6.9%
Rental BD units shipped to trade	m		0.002	0.028	0.12	0.26	0.34	30.4%
Average trade price	Skr		24.4	55.1	59.4	80.0	62.0	-22.5%
Average trade price	Euro		2.64	5.72	5.59	8.37	6.86	-18.0%
Number of titles released	no.		160	290	490	490	417	
<b>Consumer level: DVD rental</b>								
Spending on DVD rental	Skr m	1,004.0	903.0	750.0	730.0	690.0	610.0	-11.6%
Spending on DVD rental	Euro m	108.4	97.6	77.9	68.7	72.2	67.5	-6.5%
DVD rental transactions	m	25.1	25.8	24.5	23.9	22.5	20.7	-8.3%
Average rental price	Skr	40.0	35.0	30.6	30.5	30.6	29.5	-3.7%
Average rental price	Euro	4.32	3.78	3.18	2.87	3.20	3.27	1.9%
<b>Consumer level: BD rental</b>								
Spending on BD rental	Skr m		0.519	1.078	20.00	55.00	71.40	29.8%
Spending on BD rental	Euro m		0.056	0.112	1.88	5.76	7.90	37.3%
BD rental transactions	m		0.015	0.031	0.57	1.57	2.04	29.8%
Average rental price	Skr		35.0	35.0	35.0	35.0	35.0	
Average rental price	Euro		3.78	3.64	3.29	3.66	3.87	5.8%

Source: IHS Screen Digest/IVF/SVF

Population and household figures: IHS Global Insight

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

### Combined DVD & Blu-ray Disc retail top 10

Rank	Title
1	Harry Potter and the Deathly Hallows: Part 1
2	Pirates of the Caribbean: On Stranger Tides
3	Harry Potter and the Deathly Hallows: Part 2
4	Jägarna 2
5	Cars 2
6	Tangled
7	Änglagård tredje gången gillt
8	The Chronicles of Narnia: The Voyage of The Dawn Treader
9	The Lion King
10	Solsidan säsong 2

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
1	I rymden finns inga känslor
2	The Tourist
3	Salt
4	Hämnden (2010)
5	Hur många lingon finns det i världen?
6	Just Go with It
7	Winter's Bone
8	The King's Speech
9	Himlen är oskyldigt blå
10	Black Swan

Source: Sveriges Videodistributörers Förening (SVF)

Notes: 1. Ranking based on retail sales by volume

2. Units sold based on available data