

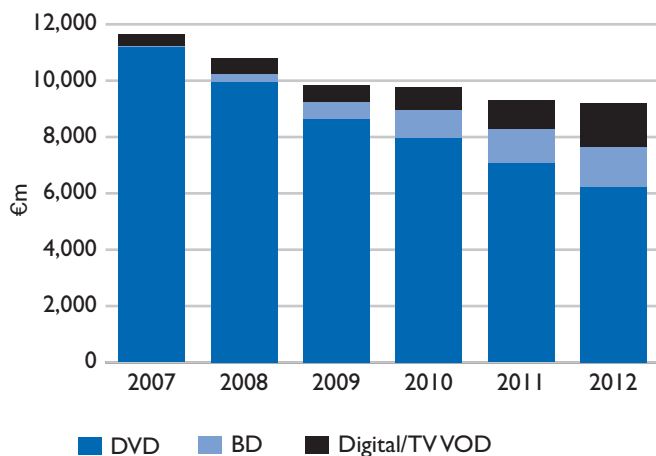
Europe

Europe: key data

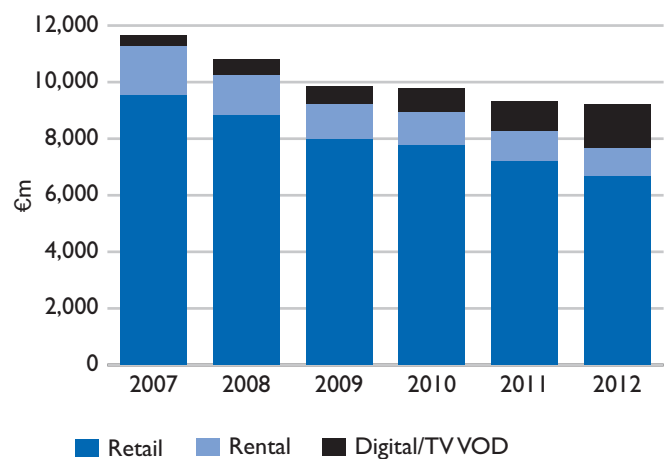
Population	612.1m
TV households	248.5m
DVD households (penetration)	75.8%
Blu-ray households (penetration)	11.3%
Distributors revenues from video software	€ 4.27bn
Comparison with 2011 (local currency)	-14.5%
DVD/ Blu-ray Disc split	€ 3.4bn / € 0.9bn
Video software rental/retail split (%)	4/96
Consumer spending on video software	€ 7.65bn
Comparison with 2011 (local currency)	-7.5%
DVD/ Blu-ray Disc split	€ 6.2bn / € 1.4bn
Video software rental/retail split (%)	13/87
Consumer spending on digital video and TVVOD	€ 1.6bn
Comparison with 2011	49.8%
Digital video/TVVOD split (%)	43 / 57



Consumer spending by format



Consumer spending by sector



Video market: Europe

		2007	2008	2009	2010	2011	2012	12/11
EXCHANGE RATES								
Exchange rate: \$1=	Euro	0.73	0.68	0.72	0.75	0.72	0.78	
GENERAL								
Population	m	606.9	608.2	609.3	610.3	611.3	612.1	0.1%
Households	m	245.9	247.6	249.3	251.0	252.6	254.2	0.6%
HARDWARE								
TV households	m	238.9	240.9	242.9	244.8	246.7	248.5	0.7%
DVD sector								
DVD Video player/recorder households	m	164.6	176.0	182.0	186.0	188.0	188.5	0.2%
Penetration of TV households	%	68.9	73.1	74.9	76.0	76.2	75.8	
DVD console households	m	35.2	37.2	39.4	41.4	43.0	41.5	-3.6%
Penetration of TV households	%	14.7	15.4	16.2	16.9	17.4	16.7	
BD sector								
BD standalone player households	m	0.063	0.877	3.3	8.1	16.5	28.2	70.4%
Penetration of TV households	%	0.026	0.364	1.3	3.3	6.7	11.3	
PS3 console households	m	3.2	7.0	11.4	15.7	20.2	24.2	19.7%
Penetration of TV households	%	1.4	2.9	4.7	6.4	8.2	9.7	

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 video	Euro m	11,674.1	10,791.4	9,856.3	9,764.7	9,309.9	9,211.0	-1.1%

		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	Euro m	6,854.2	6,197.5	5,498.7	5,470.0	4,992.7	4,267.4	-14.5%
Total revenues from retail video	Euro m	6,410.9	5,842.6	5,214.9	5,228.3	4,783.4	4,090.1	-14.5%
Total revenues from rental video	Euro m	443.4	354.9	283.8	241.7	209.4	177.2	-15.4%

		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	Euro m	11,268.5	10,258.9	9,233.9	8,941.9	8,269.8	7,652.8	-7.5%
Total spending on retail video	Euro m	9,523.2	8,816.7	7,978.4	7,775.6	7,206.9	6,677.7	-7.3%
Total spending on rental video	Euro m	1,745.3	1,442.2	1,255.5	1,166.2	1,062.9	975.0	-8.3%

Video market: Europe

		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, Internet VOD) or on a subscription basis.</i>								
Total spending on digital video	Euro m	30.0	63.7	114.3	228.1	341.8	673.7	97.1%
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 TV VOD	Euro m	375.6	468.8	508.0	594.7	698.3	884.5	26.7%

Retail video market

		2007	2008	2009	2010	2011	2012	12/11
Outlets stocking retail video	no.	50,820	51,570	49,802	47,990	39,459	29,520	
Retail chains with 10 or more outlets	no.	223	217	207	193	169	126	
Kiosks stocking retail video	no.	81,360	81,360	78,773	76,540	70,677	61,120	

Trade level: DVD retail

Revenues from retail DVD	Euro m	6,305.3	5,559.8	4,759.4	4,516.2	3,962.0	3,249.8	-18.0%
Retail DVD units shipped to trade	m	814.1	797.3	771.9	716.7	648.3	552.3	-14.8%
Average trade price	Euro	7.74	6.97	6.17	6.30	6.11	5.88	-3.7%

Trade level: BD retail

Revenues from retail BD	Euro m	76.463	277.9	455.1	712.1	821.4	840.3	2.3%
Retail BD units shipped to trade	m	4.357	17.7	35.4	59.1	71.0	76.7	8.0%
Average trade price	Euro	17.55	15.68	12.87	12.04	11.57	10.96	-5.3%

Consumer level: DVD retail

Spending on retail DVD	Euro m	9,435.0	8,540.4	7,430.6	6,885.9	6,117.5	5,430.4	-11.2%
Retail DVDs sold to consumers	m	759.3	773.8	737.4	673.0	609.7	536.2	-12.0%
Average consumer price	Euro	12.43	11.04	10.08	10.23	10.03	10.13	0.9%

Consumer level: BD retail

Spending on retail BD	Euro m	63.138	255.8	546.9	889.3	1,089.1	1,247.1	14.5%
Retail BDs sold to consumers	m	2.202	10.5	27.5	48.0	62.8	74.9	19.3%
Average consumer price	Euro	28.67	24.39	19.88	18.54	17.35	16.65	-4.0%

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.	27,296	23,226	21,536	18,232	14,259	10,410	-27.0%
Rental chains with 10 or more outlets	no.	124	122	114	93	77	49	
Trade level: DVD rental								
Revenues from rental DVD	Euro m	442.8	350.8	269.7	213.6	172.5	136.4	-20.9%
Rental DVD units shipped to trade	m	25.5	22.4	20.0	16.7	14.5	11.4	-21.0%
Average trade price	Euro	17.35	15.68	13.49	12.76	11.93	11.94	0.1%
Number of titles released	no.							
Trade level: BD rental								
Revenues from rental BD	Euro m	0.64	4.079	14.1	28.1	36.9	40.9	10.8%
Rental BD units shipped to trade	m	0	0.225	0.9	1.9	2.9	3.2	10.7%
Average trade price	Euro	21.15	18.14	15.32	14.41	12.80	12.81	0.1%
Number of titles released	no.							
Consumer level: DVD rental								
Spending on DVD rental	Euro m	1,743.3	1,426.3	1,213.1	1,080.3	942.7	804.5	-14.7%
DVD rental transactions	m	557.4	479.7	423.7	366.3	320.5	263.5	-17.8%
Average rental price	Euro	3.13	2.97	2.86	2.95	2.94	3.05	3.8%
Consumer level: BD rental								
Spending on BD rental	Euro m	1.60	15.830	42.4	86.0	120.2	170.5	41.8%
BD rental transactions	m	0.40	4.763	13.9	27.2	39.6	53.5	34.9%
Average rental price	Euro	4.04	3.32	3.06	3.16	3.03	3.19	5.1%

Source: IHS/IVF

Population and household figures: IHS Global Insight

Notes:

1. Distributor level excludes and consumer level includes VAT/sales tax.

2. Historical numbers in the UK section of this yearbook differ from those published in previous years owing to a change in the BVA's data collection methodology. This change reduced the overall value of consumer level physical video between 2007 and 2011. In addition to this, IHS has restated the historically recorded size of the UK's physical video rental market. This change follows further research into the size of the store-based rental market. These changes have impacted the total physical market at a European level. As a result historical numbers stated in the European section differ from previous yearbooks.