

Belgium

Belgium: key data

Population	10.8m
TV households	4.8m
DVD households (penetration)	75.4%
Blu-ray household (penetration)	13.5%
Distributors revenues from video software	€ 81.2m
Comparison with 2011	-22.7%
DVD/Blu-ray Disc split	€ 69.9m / € 11.3m
Video software rental/retail split (%)	1/99
Consumer spending on video software	€ 182.6m
Comparison with 2011	-8.8%
DVD/Blu-ray Disc split	€ 157.4m / € 25.1m
Video software rental/retail split (%)	5/95
Consumer spending on digital video and TV VOD	€ 81.3m
Comparison with 2011	45.5%
Digital video/TVVOD split (%)	12 / 88



In Belgium, the overall video market grew by 5 per cent thanks to the increase of consumer spending of VOD and the Blu-ray. The digital turnover increased by 45.6 per cent and the number of Blu-ray discs sold in 2012 grew by 21.1 per cent. Sales of DVDs, on the other hand, decreased by 10.5 per cent. Belgian consumers bought 12.34 million DVD's in 2012, 1.45 million fewer than in 2011.

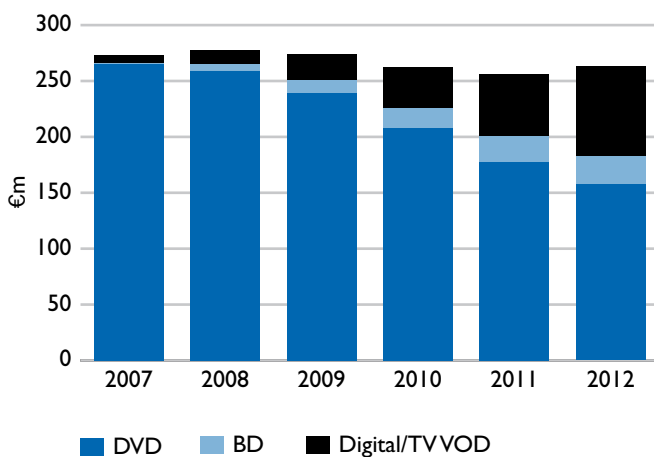
The video market is clearly converging to a mixed physical and digital market. The rapidly growing presence of tablets, smart phones, apps, smart TV's etc. is significantly boosting the digital consumption of video products. The promotion of legal online offers (downloading and streaming), is necessary to show secure and user-friendly alternatives for watching films and audiovisual content. A diverse and high quality offer of audiovisual content online is key to a sustainable video market

In 2012, the most popular film title on DVD and Blu-Ray was "Twilight Saga/Breaking Dawn - Part 1". TV series continued to be successful and the best-selling title was "Game of Thrones" followed by the Belgian comedy TV program "Caméra planquées de François Damien".

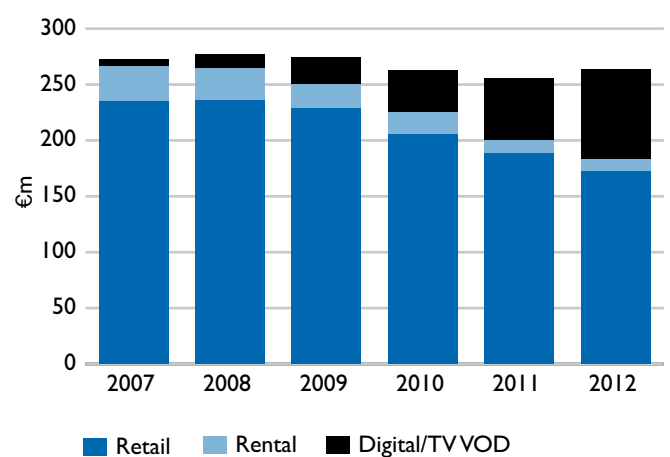
This commentary was provided by BEA, representing the Belgian games, music- and video industry.

Video market: Belgium

Consumer spending by format



Consumer spending by sector



		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	10.5	10.6	10.6	10.7	10.7	10.8	0.4%
Households	m	4.6	4.6	4.7	4.7	4.8	4.8	0.9%
HARDWARE								
TV households	m	4.5	4.6	4.6	4.7	4.7	4.8	0.8%
DVD sector								
DVD Video player/recorder households	m	3.169	3.312	3.538	3.611	3.636	3.592	-1.2%
Penetration of TV households	%	69.8	72.1	76.2	77.1	76.9	75.4	
DVD console households	m	0.844	0.894	0.907	0.922	0.963	0.935	-2.9%
Penetration of TV households	%	18.6	19.5	19.5	19.7	20.4	19.6	
BD sector								
BD standalone player households	m	0.002	0.010	0.060	0.143	0.327	0.645	97.0%
Penetration of TV households	%	0.0	0.218	1.282	3.1	6.9	13.5	
PS3 console households	m	0.078	0.183	0.302	0.423	0.566	0.688	21.5%
Penetration of TV households	%	1.7	4.0	6.5	9.0	12.0	14.4	

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	Euro m	273.0	277.4	273.9	262.2	256.1	263.9	3.1%
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	201.7	190.6	172.7	146.0	105.1	81.2	-22.7%
Total revenues from retail video	Euro m	190.5	181.0	166.7	140.5	103.8	80.6	-22.4%
Total revenues from rental video	Euro m	11.2	9.7	6.1	5.5	1.2	0.6	-47.8%

Video market: Belgium

		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	266.3	264.6	250.6	225.3	200.1	182.6	-8.8%
Total spending on retail video	Euro m	234.8	235.9	228.5	205.6	187.9	172.6	-8.2%
Total spending on rental video	Euro m	31.5	28.7	22.1	19.7	12.2	10.0	-18.5%

		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	0.2	0.4	0.4	0.3	1.2	9.8	696.3%
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	Euro m	6.5	12.4	22.9	36.6	54.7	71.5	30.8%

Retail video market

		2007	2008	2009	2010	2011	2012	12/11
Outlets stocking retail video	no	2,400	2,400	2,352	2,305	1,544	1,200	
Retail chains with 10 or more outlets	no	10	10	10	9	6	6	
Kiosks stocking retail video	no	600	600	570	542	363	280	

Trade level: DVD retail

Revenues from retail DVD	Euro m	186.8	173.4	157.1	129.4	87.6	69.4	-20.9%
Retail DVD shipped to trade	m	25.3	24.4	24.6	20.6	13.5	14.0	3.9%
Average trade price	Euro	7.40	7.10	6.38	6.27	6.51	4.96	-23.8%
Number of titles released	no	3,450	3,500	3,500	3,200	2,880	2,592	-10.0%

Trade level: BD retail

Revenues from retail BD	Euro m	1.9	7.6	9.5	11.1	16.2	11.2	-30.8%
Retail BD shipped to trade	m	0.1	0.5	0.7	0.9	1.5	1.4	-4.2%
Average trade price	Euro	17.90	14.00	13.77	12.82	10.87	7.85	-27.8%

Consumer level: DVD retail

Spending on retail DVD	Euro m	233.4	230.5	217.0	189.5	166.1	148.2	-10.8%
Retail DVD sold to consumers	m	19.1	19.2	17.6	15.5	13.8	12.3	-10.5%
Average consumer price	Euro	12.22	12.03	12.35	12.22	12.05	12.01	-0.3%

Consumer level: BD retail

Spending on retail BD	Euro m	1.1	5.3	11.5	16.1	21.8	24.4	11.8%
Retail BD sold to consumers	m	0.0	0.20	0.48	0.80	1.21	1.47	21.5%
Average consumer price	Euro	28.50	26.70	23.96	20.14	18.02	16.59	-7.9%

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	750	700	560	382	300	-21.5%
Rental chains with 10 or more outlets	no	9	9	7	5	3	3	

Trade level: DVD rental

Revenues from rental DVD	Euro m	11.2	9.7	6.0	5.0	1.0	0.6	-45.3%
Rental DVD shipped to trade	m	0.8	0.8	0.5	0.6	0.1	0.0	-32.5%
Average trade price	Euro	14.00	12.12	12.52	8.26	16.29	13.19	-19.0%
Number of titles released	no	950	925	925	800	408	300	-26.5%

Trade level: BD rental

Revenues from rental BD	Euro m			0.09	0.514	0.190	0.074	-61.2%
Rental BD shipped to trade	m			0	0.028	0.011	0.005	-53.3%
Average trade price	Euro		14.00	15.74	18.54	17.18	14.29	-16.8%
Number of titles released	no		380	786	750	347	300	-13.5%

Consumer level: DVD rental

Spending on DVD rental	Euro m	31.5	28.6	21.9	18.6	11.4	9.2	-18.8%
DVD rental transactions	m	10.2	9.2	7.0	6.0	3.6	2.9	-19.5%
Average rental price	Euro	3.09	3.12	3.15	3.12	3.15	3.18	0.9%

Consumer level: BD rental

Spending on BD rental	Euro m		0.06	0.179	1.054	0.850	0.729	-14.3%
BD rental transactions	m		0.02	0.057	0.338	0.270	0.230	-15.0%
Average rental price	Euro		3.12	3.15	3.12	3.15	3.18	0.9%

Source: IHS/IVF/BEA

Population and household figures: IHS Global Insight

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

Film DVD & Blu-ray Disc combined

Rank	DVD & Blu-ray
1	The Twilight Saga - Breaking Dawn - Pt I
2	Adventures of Tintin - Secret of the Unicorn
3	Intouchables
4	Hunger Games
5	Brave
6	Ice Age 4 - Continental Drift
7	Avengers Assemble
8	Puss in Boots
9	Smurfen
10	The Dark Knight Rises

Source: Belgium Entertainment Association (BEA)

Notes: 1. Ranking based on retail sales by volume

2. Units sold based on available data

TV DVD & Blu-ray Disc combined

Rank	Title
1	Game of Thrones
2	Camera Planquees de Francois Damiens
3	Vampire Diaries 2
4	True Blood - Season 4
5	Twilight
6	Desperate Housewives - Season 7
7	Spartacus - Blood and Sand
8	Walking Dead
9	One Tree Hill - Season 8
10	Vampire Diaries

Source: Belgium Entertainment Association (BEA)

Notes: 1. Ranking based on retail sales by volume

2. Units sold based on available data