

# Belgium

## Belgium: key data

Population	10.6m
TV households	4.7m
DVD households (penetration)	77.1%
Blu-ray household (penetration)	3.1%
<b>Distributors revenues from physical video software</b>	<b>€ 146m</b>
Comparison with 2009	-15.5%
DVD/ Blu-ray Disc split	€ 134.4m / € 11.6m
Video software rental/retail split (%)	4/96
<b>Consumer spending on physical video software</b>	<b>€ 225.1m</b>
Comparison with 2009	-10.0%
DVD/ Blu-ray Disc split	€ 208m / € 17.1m
Video software rental/retail split (%)	9/91



## DVD and Blu-ray market

The total Belgian video market decreased significantly by 10 per cent in 2010 and total units sold decreased by 9.6 per cent. Although the sales of Blu-ray Discs (BD) increased by 66.7 per cent (320,000 units more than in 2009), the number of DVD discs sold continued to drop. In 2010, Belgian consumers bought 2 million DVD discs less than in 2009. The most popular title on DVD and Blu-ray Disc was "Avatar". 50 per cent of the top TV shows sold on DVD were of Belgian origin - 'Van Vlees and Blood' or 'Bumba in Afrika'.

## Online distribution

The home entertainment market in Belgium has gone online. All video publishers are making their catalogues available through streaming services offered by the major ISPs. Several members of BEA Video invested in innovative ways to enjoy movies by developing movie applications for the use on iPod, iPad or iPhone.

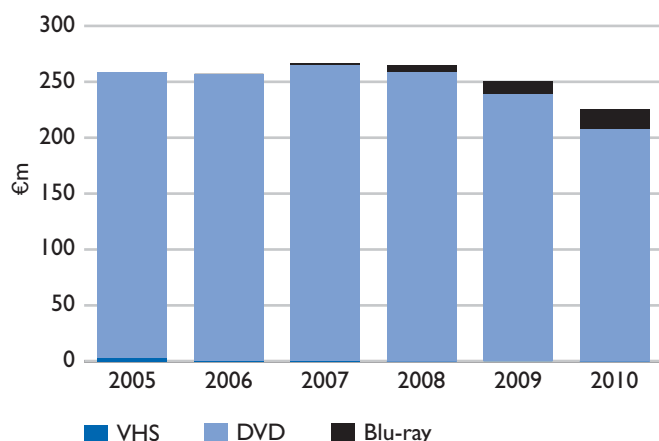
## Other relevant developments

The Belgian minister of economic affairs has publicly stated that it is the task of the industry to develop legal offers online. The public authorities, on the other hand, are responsible for protecting the digital entertainment industry by fighting online piracy.

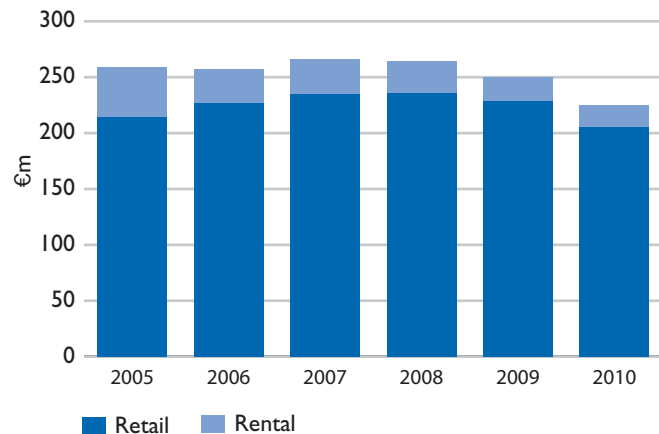
*This commentary was provided by BEA, representing the Belgian games-, music- and video industry.*

## Video market: Belgium

### Consumer spending by format



### Consumer spending by sector



		2005	2006	2007	2008	2009	2010	10/09
<b>EXCHANGE RATE: \$1=</b>	Euro	0.80	0.80	0.73	0.68	0.72	0.75	

#### GENERAL

Population	m	10.51	10.59	10.60	10.61	10.62	10.63	0.1%
Households	m	4.43	4.46	4.49	4.52	4.54	4.57	0.5%

#### HARDWARE

TV households	m	4.4	4.5	4.5	4.6	4.6	4.7	1.0%
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#### DVD sector

DVD Video player/recorder households	m	2.378	2.802	3.166	3.308	3.534	3.606	2.1%
Penetration of TV households	%	53.7	62.4	69.8	72.1	76.2	77.1	
DVD console households	m	0.739	0.795	0.844	0.896	0.912	0.932	0.023
Penetration of TV households	%	16.7	17.7	18.6	19.5	19.7	19.9	

#### BD sector

BD standalone player households	m			0.002	0.010	0.060	0.143	140.3%
Penetration of TV households	%			0.033	0.218	1.3	3.1	
PS3 console households	m			0.078	0.183	0.302	0.423	40.1%
Penetration of TV households	%			1.7	4.0	6.5	9.0	

## Total video software market

		2005	2006	2007	2008	2009	2010	10/09
<b>TRADE LEVEL PHYSICAL LEVEL</b>								
Total revenues from video software	Euro m	208.3	197.2	201.7	190.6	172.7	146.0	-15.5%
Total revenues from retail video	Euro m	192.2	186.9	190.5	181.0	166.7	140.5	-15.7%
Total revenues from rental video	Euro m	16.1	10.3	11.2	9.7	6.1	5.5	-9.6%
<b>CONSUMER LEVEL PHYSICAL VIDEO</b>								
Total spending on video software	Euro m	258.5	257.0	266.4	264.4	250.2	225.1	-10.0%
Total spending on retail video	Euro m	214.6	227.1	234.8	235.9	228.5	205.6	-10.0%
Total spending on rental video	Euro m	43.9	29.9	31.6	28.5	21.7	19.6	-10.0%

## Video market: Belgium

		2005	2006	2007	2008	2009	2010	10/09
<b>CONSUMER LEVEL DIGITAL VIDEO*</b>								
Total spending on digital video	Euro m	0.0	0.0	0.2	0.4	0.4	0.3	-10.9%
<b>CONSUMER LEVEL TVVOD**</b>								
Total spending on TVVOD	Euro m	2.3	6.5	11.4	20.1	35.2	45.8	30.1%

\*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.

\*\*The delivery of movies and TV content on a transactional (VoD/NVoD/PPV) basis via cable/satellite/IPTV services.

## Retail video market

		2005	2006	2007	2008	2009	2010	10/09
Outlets stocking retail video	no	2,400	2,400	2,400	2,400	2,352	2,305	
Retail chains with 10 or more outlets	no	10	10	10	10	10	9	
Kiosks stocking retail video	no	600	600	600	600	570	542	
<b>Trade level: DVD retail</b>								
Revenues from retail DVD	Euro m	191.9	186.9	186.8	173.4	157.1	129.4	-17.6%
Retail DVD shipped to trade	m	24.6	28.1	25.3	24.4	24.6	20.6	-16.2%
Average trade price	Euro	7.80	6.65	7.40	7.10	6.38	6.27	-1.7%
Number of titles released	no	3,400	3,500	3,450	3,500	3,500	3,200	-8.6%
<b>Trade level: BD retail</b>								
Revenues from retail BD	Euro m			1.9	7.6	9.5	11.1	16.2%
Retail BD shipped to trade	m			0.1	0.5	0.7	0.9	24.8%
Average trade price	Euro			17.90	14.00	13.77	12.82	-6.9%
<b>Consumer level: DVD retail</b>								
Spending on retail DVD	Euro m	212.0	226.7	233.4	230.5	217.0	189.5	-12.7%
Retail DVD sold to consumers	m	20.3	17.7	19.1	19.2	17.6	15.5	-11.7%
Average consumer price	Euro	10.45	12.79	12.22	12.03	12.35	12.22	-1.1%
<b>Consumer level: BD retail</b>								
Spending on retail BD	Euro m			1.1	5.3	11.5	16.1	40.0%
Retail BD sold to consumers	m			0.04	0.20	0.48	0.80	67.3%
Average consumer price	Euro			28.50	26.70	23.96	20.05	-16.3%

### Rental video market

		2005	2006	2007	2008	2009	2010	10/09
Video rental outlets	no	800	800	750	750	700	560	
Rental chains with 10 or more outlets	no	9	9	9	9	7	5	
<b>Trade level: DVD rental</b>								
Revenues from rental DVD	Euro m	16.1	10.3	11.2	9.7	6.0	5.0	-16.8%
Rental DVD shipped to trade	m	0.6	0.5	0.8	0.8	0.5	0.6	26.2%
Average trade price	Euro	25.13	19.70	14.00	12.12	12.52	8.26	-34.0%
Number of titles released	no	1,000	1,000	950	925	925	800	-13.5%
<b>Trade level: BD rental</b>								
Revenues from rental BD	Euro m					0.095	0.514	
Rental BD shipped to trade	m					0.006	0.028	
Average trade price	Euro				14.00	15.74	18.54	17.8%
Number of titles released	no				380	786	750	-4.6%
<b>Consumer level: DVD rental</b>								
Spending on DVD rental	Euro m	43.6	29.9	31.6	28.4	21.6	18.5	-14.1%
DVD rental transactions	m	14.1	9.7	10.2	9.2	7.0	6.0	-14.1%
Average rental price	Euro	3.10	3.10	3.10	3.10	3.10	3.10	0.0%
<b>Consumer level: BD rental</b>								
Spending on BD rental	Euro m				0.063	0.177	1.047	492.8%
BD rental transactions	m				0.020	0.057	0.338	492.8%
Average rental price	Euro				3.10	3.10	3.10	

Source: IHS Screen Digest/IVF

Population and household figures: Economist Intelligence Unit

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

## Video market: Belgium

### DVD retail top 10 (units)

Rank	Title
1	Avatar
2	Twilight Saga: New Moon
3	Inglourious Basterds
4	Princess & The Frog
5	Michael Jackson's This Is It
6	2012
7	Twilight Saga: Eclipse
8	Twilight
9	Alice in Wonderland
10	Up

\*Source : GfK/Belgian Entertainment Association (BEA)

Notes: 1. Ranking based on retail sales by volume

2. Units sold based on available data

### Top 10 TV series (units)

Rank	Title
1	The Pacific
2	Band of Brothers
3	Van Vlees en Bloed
4	Buiten de Zone
5	F.C. De Kampioenen 20
6	One Tree Hill 6
7	Buiten de Zone 2
8	True Blood
9	Pippilangkous
10	Bumba: In Africa

\*Source : GfK/Belgian Entertainment Association (BEA)

Notes: 1. Ranking based on retail sales by volume

2. Units sold based on available data

### Blu-ray Disc retail top 10 (units)

Rank	Title
1	Avatar
2	2012
3	Alice in Wonderland
4	Sherlock Holmes 2010
5	Inception
6	Inglourious Basterds
7	Prince of Persia: The Sands of Time
8	Clash of the Titans
9	Michael Jackson's This Is It
10	Ironman 2

\*Source : GfK/Belgian Entertainment Association (BEA)

Notes: 1. Ranking based on retail sales by volume

2. Units sold based on available data