

Belgium

Belgium: key data

Population	10.7m
TV households	4.7m
DVD Video player/recorder	76.9%
Blu-ray Disc player/recorders penetration	6.9%
Distributor revenues from physical video software	€ 93.9m
Comparison with 2010	-35.7%
DVD/ Blu-ray Disc split	€ 88.7m / € 5.2m
Video software rental/retail split (%)	1 / 99
Consumer spending on physical video software	€ 200.1m
Comparison with 2010	-11.1%
DVD/ Blu-ray Disc split	€ 177.4m / € 22.7m
Video software rental/retail split (%)	6 / 94
Consumer spending on digital video and TV VOD	€ 59.7m
Comparison with 2010	21%
Digital video/TVVOD split (%)	98 / 2



DVD and Blu-ray market

In Belgium, consumer spending on video software decreased by 11 per cent and total units sold decreased by 8 per cent. Blu-ray Disc sales grew significantly by 51 per cent and exceeded one million units sold (410.000 units more than in 2010). The number of films sold on DVD continued to drop. In 2011, Belgian consumers bought 13.7 millions discs, 1.72 millions less than in 2010.

The most popular film title on DVD and Blu-ray Disc was 'HARRY POTTER 7/THE DEATHLY HALLOWS PART 1'. In 2011, TV series were very popular. The best selling title was 'Pacific', but also Flemish TV series like "Van Vlees en Bloed" and "FC de kampioenen" sold very well.

Online distribution

The offer of films and TV-series online is growing due to a wide range of streaming services and sites such as DirectMovie and iTunes.

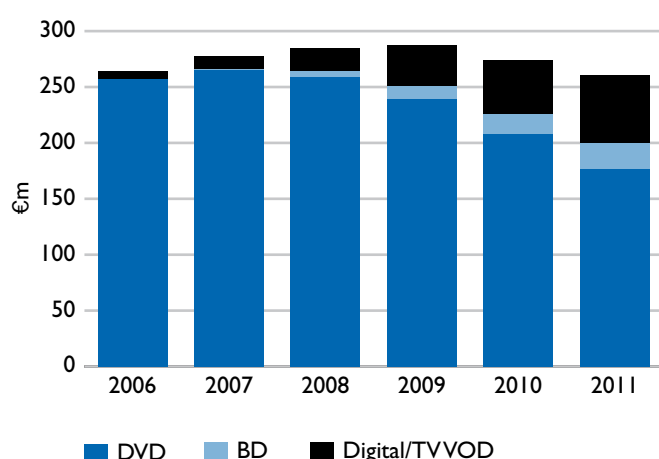
Other relevant developments

Online piracy is still hampering the full potential of licensed streaming- and downloadservices for audiovisual content. The court of Appeal in Antwerp has forced the two biggest ISPs in Belgium to block access to the infringing website "The Pirate Bay". As a result, the Belgian traffic to the Pirate Bay dropped significantly. In addition, online gambling sites are blacklisted and blocked if they are accessible in Belgium without a license to operate.

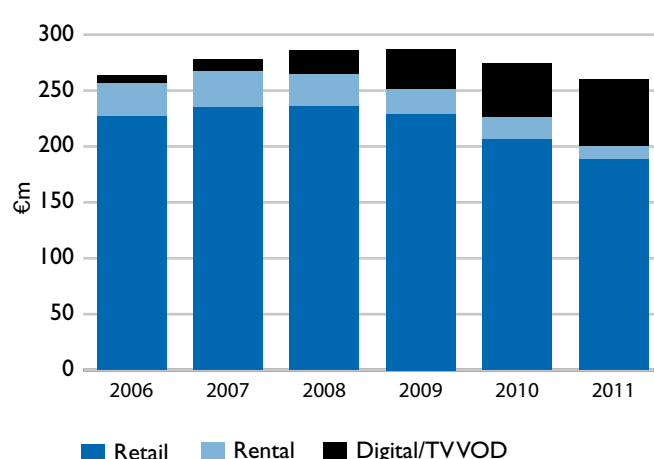
This commentary was provided by BEA, representing the Belgian games-, music- and video industry.

Video market: Belgium

Consumer spending by format



Consumer spending by sector



		2006	2007	2008	2009	2010	2011	10/11
EXCHANGE RATES								
Exchange rate: \$1 =	Euro	0.80	0.73	0.68	0.72	0.75	0.72	
GENERAL								
Population	m	10.5	10.5	10.6	10.6	10.7	10.7	0.4%
Households	m	4.5	4.6	4.6	4.7	4.7	4.8	0.9%
HARDWARE								
TV households	m	4.5	4.5	4.6	4.6	4.7	4.7	0.9%
DVD sector								
DVD Video player/recorder households	m	2.8	3.2	3.3	3.5	3.6	3.6	0.7%
Penetration of TV households	%	62.4	69.8	72.1	76.2	77.1	76.9	
DVD console households	m	0.8	0.8	0.9	0.9	0.9	1.0	4.4%
Penetration of TV households	%	17.7	18.6	19.5	19.5	19.7	20.4	
BD sector								
BD standalone player households	m		0.002	0.010	0.06	0.14	0.33	128.9%
Penetration of TV households	%		0.033	0.2	1.3	3.1	6.9	
PS3 console households	m		0.1	0.2	0.3	0.4	0.6	33.9%
Penetration of TV households	%		1.7	4.0	6.5	9.0	12.0	

Total video software market

		2006	2007	2008	2009	2010	2011	10/11
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	197.2	201.7	190.6	172.7	146.0	93.9	-35.7%
Total revenues from retail video	Euro m	186.9	190.5	181.0	166.7	140.5	92.8	-34.0%
Total revenues from rental video	Euro m	10.3	11.2	9.7	6.1	5.5	1.2	-78.6%

Video market: Belgium

		2006	2007	2008	2009	2010	2011	10/11
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	257.0	266.4	264.4	250.2	225.1	200.1	-11.1%
Total spending on retail video	Euro m	227.1	234.8	235.9	228.5	205.6	187.9	-8.6%
Total spending on rental video	Euro m	29.9	31.6	28.5	21.7	19.6	12.2	-37.7%

		2006	2007	2008	2009	2010	2011	10/11
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	0.0	0.2	0.4	0.4	0.3	1.3	304.1%

		2006	2007	2008	2009	2010	2011	10/11
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	11.2	20.1	35.4	49.0	58.4	19.2%

Retail video market

		2006	2007	2008	2009	2010	2011	10/11
Outlets stocking retail video	no.	2,400	2,400	2,400	2,352	2,305	1,544	
Retail chains with 10 or more outlets	no.	10	10	10	10	9	6	
Kiosks stocking retail video	no.	600	600	600	570	542	363	

Trade level: DVD retail

Revenues from retail DVD	Euro m	186.9	186.8	173.4	157.1	129.4	87.6	-32.3%
Retail DVD units shipped to trade	m	28.1	25.3	24.4	24.6	20.6	13.5	-34.8%
Average trade price	Euro	6.65	7.40	7.10	6.38	6.27	6.51	3.9%
Number of titles released	no.	3,500	3,450	3,500	3,500	3,200	2,880	

Trade level: BD retail

Revenues from retail BD	Euro m		1.9	7.6	9.5	11.1	5.1	-53.8%
Retail BD units shipped to trade	m		0.11	0.54	0.7	0.9	0.7	-24.5%
Average trade price	Euro		17.90	14.00	13.77	12.82	7.85	-38.7%
Number of titles released	no.		30	400	380	920	960	

Consumer level: DVD retail

Spending on retail DVD	Euro m	226.7	233.4	230.5	217.0	189.5	166.1	-12.3%
Retail DVDs sold to consumers	m	17.7	19.1	19.2	17.6	15.5	13.8	-11.1%
Average consumer price	Euro	12.79	12.22	12.03	12.35	12.22	12.05	-1.4%

Consumer level: BD retail

Spending on retail BD	Euro m		1.1	5.3	11.5	16.1	21.8	35.4%
Retail BDs sold to consumers	m		0.04	0.2	0.5	0.8	1.2	50.7%
Average consumer price	Euro		28.50	26.70	23.96	20.05	18.02	-10.1%

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	750	700	560	382	
Rental chains with 10 or more outlets	no.	9	9	9	7	5	3	

Trade level: DVD rental

Revenues from rental DVD	Euro m	10.3	11.2	9.7	6.0	5.0	1.0	-79.0%
Rental DVD units shipped to trade	m	0.5	0.8	0.8	0.5	0.6	0.1	-89.3%
Average trade price	Euro	19.70	14.00	12.12	12.52	8.26	16.29	97.2%
Number of titles released	no.	1,000	950	925	925	800	408	

Trade level: BD rental

Revenues from rental BD	Euro m				0.09	0.51	0.13	-75.3%
Rental BD units shipped to trade	m				0.01	0.03	0.01	-74.0%
Average trade price	Euro			14.00	15.74	18.54	17.59	-5.1%
Number of titles released	no.			380	786	750	347	

Consumer level: DVD rental

Spending on DVD rental	Euro m	29.9	31.6	28.4	21.6	18.5	11.3	-38.8%
DVD rental transactions	m	9.7	10.2	9.2	7.0	6.0	3.6	-39.5%
Average rental price	Euro	3.10	3.10	3.10	3.10	3.10	3.14	1.2%

Consumer level: BD rental

Spending on BD rental	Euro m			0.06	0.18	1.05	0.85	-19.0%
BD rental transactions	m			0.02	0.06	0.34	0.27	-20.0%
Average rental price	Euro			3.10	3.10	3.10	3.14	1.2%

Source: IHS Screen Digest/IVF/BEA

Population and household figures: IHS Global Insight

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

DVD retail top 10

Rank	Title
1	Harry Potter and the Deathly Hallows: Part 1
2	Harry Potter and the Deathly Hallows: Part 2
3	Smurfen
4	Rapunzel
5	Cars 2
6	Pirates of the Caribbean: On Stranger Tides
7	Rien a Declarer
8	Twilight Saga: Eclipse
9	Despicable Me
10	Alice in Wonderland

Source: Belgium 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

Rank	Title
1	Harry Potter and the Deathly Hallows: Part 1
2	Star Wars: The Complete Saga
3	Pirates of the Caribbean: On Stranger Tides
4	Harry Potter and the Deathly Hallows: Part 2
5	Inception
6	Rapunzel
7	Transformers: Dark Side of the Moon
8	Smurfen
9	Tron Legacy
10	Cars 2

Source: Belgium Entertainment Association (BEA)

Notes: 1. Ranking based on retail sales by volume

2. Units sold based on available data

Combined DVD & Blu-ray Disc retail top 10

Rank	Title
1	Harry Potter and the Deathly Hallows: Part 1
2	Harry Potter and the Deathly Hallows: Part 2
3	Rapunzel
4	Smurfen
5	Cars 2
6	Pirates of the Caribbean: On Stranger Tides
7	Rien a Declarer
8	Twilight Saga: Eclipse
9	Inception
10	Despicable Me

Source: Belgium Entertainment Association (BEA)

Notes: 1. Ranking based on retail sales by volume

2. Units sold based on available data