

Europe: key data 2007

Europe



	All Europe	West Europe
Population	495	402
Households	203	169
TV households	235	165
VCR households	113	95
DVD player/recorder households	163	129
Total distributors revenues from video software	6.719	6.470
Total consumer spending on video software	11.465	11.072

Data for West Europe covers Austria, Belgium, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, UK.

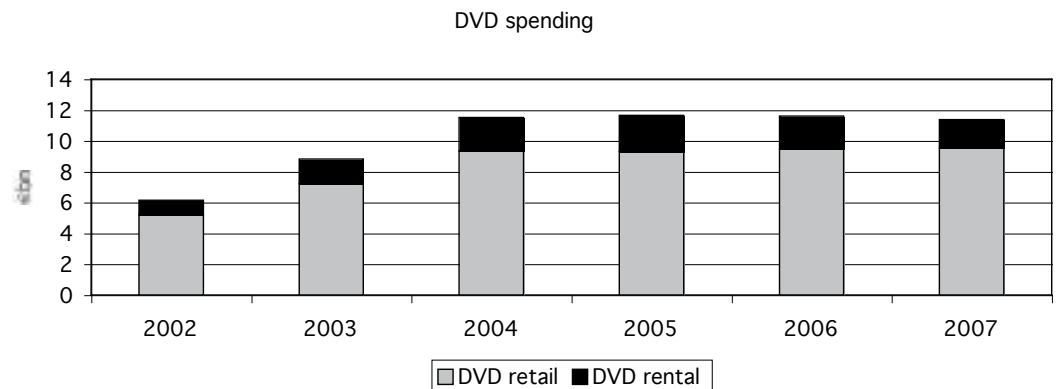
Data for Central/Eastern Europe covers Croatia, Czech Republic, Hungary, Poland, Russia

The Industry Overview

DVD player penetration reached close to 70 per cent in Europe in 2007. Retail DVD continued to show growth in 2007 with volume sales increasing by 4.5 per cent.

Consumer spending on the rental and purchase of video software in Europe reached EUR 11.5 billion.

The high-definition discs formats, Blu-Ray and HD-DVD, contributed EUR 89 million to the total video spending in Europe in 2007.





VIDEO MARKET: EUROPE

		2002	2003	2004	2005	2006	2007	change 07/06
EXCHANGE RATES								
exchange rate: Euro 1=								
exchange rate: \$1=								
exchange rate: \$1=	Euro	1,06	0,88	0,80	0,80	0,80	0,73	-8,4%
GENERAL								
population	m	486,23	491,15	489,59	491,58	493,25	494,85	
households	m	196,15	197,78	199,22	200,56	201,75	203,03	
HARDWARE								
TV households	m	226,7	228,6	230,4	232,2	234,1	235,2	0,4%
VCR sector								
VCR households	m	149,2	150,9	149,3	138,1	125,0	112,9	-9,7%
VCR penetration of TV households	%	65,8	66,0	64,8	59,5	53,4	48,0	
DVD sector								
DVD Video player/recorder HHs	m	30,6	59,0	90,3	121,5	146,7	163,5	11,4%
Penetration of DVD Video player/recorders	%	13,5	25,8	39,2	52,3	62,6	69,5	
DVD console households	m	12,1	19,2	23,5	30,1	31,7	34,5	8,6%
Penetration of DVD Video consoles	%	5,3	8,4	10,2	13,0	13,6	14,7	
TOTAL VIDEO SOFTWARE MARKET								
TRADE LEVEL								
total revenues from video software	euro m	6.284,5	6.719,5	7.510,7	6.833,3	6.658,2	6.719,4	0,9%
total revenues from retail video	euro m	5.426,3	5.891,8	6.761,8	6.154,2	6.122,6	6.283,3	2,6%
total revenues from rental video	euro m	858,1	827,7	748,9	679,0	535,6	436,1	-18,6%
CONSUMER LEVEL								
total spending on video software	euro m	10.999,2	11.815,0	12.923,5	12.048,6	11.664,5	11.465,2	-1,7%
total spending on retail video	euro m	8.272,2	9.147,1	10.262,7	9.589,8	9.522,3	9.610,7	0,9%
total spending on rental video	euro m	2.727,0	2.667,9	2.660,8	2.458,8	2.142,1	1.854,5	-13,4%



VIDEO MARKET: EUROPE

	2002	2003	2004	2005	2006	2007	change 07/06
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RETAIL VIDEO MARKET

outlets stocking retail video	no
retail chains with 10 or more outlets	no
kiosks stocking retail video	no

Trade level: VHS retail

revenues from retail VHS	euro m	1.882,0	1.108,8	512,6	103,1	10,8	
retail cassettes shipped to trade	m	274,0	188,3	110,6	33,3	4,1	
average trade price	euro	6,87	5,89	4,64	3,10	2,65	

Trade level: DVD retail

revenues from retail DVD	euro m	3.544,3	4.782,9	6.249,2	6.051,2	6.109,6	6.179,6	1,1%
retail DVD discs shipped to trade	m	257,4	419,4	618,3	668,1	741,2	781,9	5,5%
average trade price	euro	13,77	11,41	10,11	9,06	8,24	7,90	-4,1%

Trade level: Total hi-def disc retail (Blu-ray and HD DVD)

revenues from hi-def disc	euro m					2,2282	103,7	
Hi-def discs shipped to trade	m					0,1321	6,2	
average trade price	euro					16,86	16,69	-1,0%

Consumer level: VHS retail

spending on retail VHS	euro m	3.079,1	1.939,9	932,1	288,1	43,7	9,4	-78,6%
retail cassettes sold to consumers	m	264,5	186,8	110,8	38,4	9,0	2,3	-74,8%
average consumer price	euro	11,64	10,39	8,42	7,51	4,86	4,14	-14,9%

Consumer level: DVD retail

spending on retail DVD	euro m	5.193,1	7.207,2	9.330,6	9.301,8	9.478,0	9.518,4	0,4%
DVD discs sold to consumers	m	241,6	401,7	580,8	663,4	723,0	755,7	4,5%
average consumer price	euro	21,49	17,94	16,06	14,02	13,11	12,60	-3,9%

Consumer level: Total hi-def disc retail (Blu-ray and HD DVD)

spending on hi-def disc	euro m					0,5955	82,9	
Hi-def discs sold to consumers	m					0,0220	2,9	
average consumer price	euro					27,10	28,63	5,7%



	2002	2003	2004	2005	2006	2007	change 07/06
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RENTAL MARKET

video rental outlets	no
rental chains with 10 or more outlets	no

Trade level: VHS rental

revenues from rental VHS	euro m	541,7	330,5	133,4	31,7		
rental cassettes shipped to trade	m	21,5	14,0	7,2	2,3		
average trade price	euro	25,18	23,54	18,55	13,63		

Trade level: DVD rental

revenues from rental DVD	euro m	316,5	497,2	615,6	647,3	535,6	436,1	-18,6%
rental discs shipped to trade	m	13,7	22,2	30,2	33,2	28,7	24,9	-13,2%
average trade price	euro	23,06	22,36	20,38	19,52	18,67	17,52	-6,1%

Consumer level: VHS rental

spending on VHS rental	euro m	1.784,5	1.049,7	474,2	122,3	20,6	0,2	-99,0%
VHS rental transactions	m	602,1	363,1	172,5	48,7	9,3	0,2	-97,9%
average rental charge	euro	2,96	2,89	2,75	2,51	2,21	1,00	-54,7%

Consumer level: DVD rental

spending on DVD rental	euro m	942,6	1.618,2	2.186,7	2.336,5	2.121,5	1.854,3	-12,6%
DVD rental transactions	m	270,8	486,5	670,3	726,7	652,9	575,1	-11,9%
average rental price	euro	3,48	3,33	3,26	3,22	3,25	3,22	-0,8%

Source: Screen Digest/IVF

Population and Household figures being produced by the Economist Intelligence Unit

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