

Europe: key data 2005

Europe



	All Europe	West Europe
Population	459m	397m
Households	190m	167m
TV households	230m	162m
VCR households	138m	112m
DVD player/recorder households	121,8m	104,8m
Total distributors revenues from video software	€ 6,7bn	€ 6,5bn
Total consumer spending on video software	€ 12,0bn	€ 11,8bn

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 53 per cent in Europe in 2005. Retail DVD continued to show strong growth in 2005 with volume sales increasing by 14 percent year-on-year.

Consumer spending on the rental and purchase of videocassettes and DVDs in Europe reached EUR 12 billion.

The DVD format has now almost entirely replaced VHS in the European retail video market, accounting for 94 per cent of total European video sales (657 m units).



VIDEO MARKET: EUROPE



		2000	2001	2002	2003	2004	2005	change 05/04
EXCHANGE RATES								
exchange rate: \$1=	Euro	1,08	1,12	1,06	0,88	0,80	0,80	
GENERAL								
population	m	600,82	602,34	604,19	605,62	606,86	459,47	-24,3%
households	m	234,68	236,63	237,78	239,37	240,90	190,45	-20,9%
HARDWARE								
TV households	m	221,7	223,9	225,2	226,9	228,7	230,5	0,8%
VCR sector								
VCR households	m	140,6	145,2	149,9	151,6	149,6	137,7	-8,0%
VCR penetration of TV households	%	63,4	64,9	66,6	66,8	65,4	59,7	-8,7%
DVD sector								
DVD Video player/recorder HHs	m	5,2	13,8	30,9	59,8	90,2	121,8	35,1%
Penetration of DVD Video player/recorders	%	2,4	6,2	13,7	26,4	39,4	52,9	34,0%
DVD console households	m	0,7	5,3	12,1	19,2	22,0	30,2	37,1%
Penetration of DVD Video consoles	%	0,3	2,4	5,4	8,4	9,6	13,1	36,0%
TOTAL VIDEO SOFTWARE MARKET								
TRADE LEVEL								
total revenues from video software	euro m	4.147,9	4.838,7	6.275,3	6.711,9	7.503,8	6.695,6	-10,8%
total revenues from retail video	euro m	3.380,7	4.014,7	5.418,0	5.880,4	6.756,1	6.019,6	-10,9%
total revenues from rental video	euro m	767,2	824,0	857,3	831,4	747,7	676,0	-9,6%
CONSUMER LEVEL								
total spending on video software	euro m	7.297,1	8.525,2	10.997,4	11.803,2	12.847,9	12.018,5	-6,5%
total spending on retail video	euro m	4.897,9	6.067,2	8.269,3	9.123,5	10.182,6	9.517,7	-6,5%
total spending on rental video	euro m	2.399,3	2.458,1	2.728,1	2.679,7	2.665,3	2.500,8	-6,2%



VIDEO MARKET: EUROPE



	2000	2001	2002	2003	2004	2005	change 05/04
--	------	------	------	------	------	------	-----------------

RETAIL VIDEO MARKET

outlets stocking retail video	no	66.662	66.645	70.045	66.911	66.020	65.117	-1,4%
retail chains with 10 or more outlets	no	253	253	252	252	226	230	1,8%
kiosks stocking retail video	no	93.320	83.830	80.370	79.480	79.430	81.360	2,4%

Trade level: VHS retail

revenues from retail VHS	euro m	2.345,1	2.013,4	1.882,9	1.108,0	512,2	104,6	-79,6%
retail cassettes shipped to trade	m	291,5	273,2	274,0	188,3	110,6	33,9	-69,4%
average trade price	euro	8,0	7,4	6,9	5,9	4,6	3,1	-33,3%

Trade level: DVD retail

revenues from retail DVD	euro m	1.035,5	2.001,3	3.535,0	4.772,5	6.243,9	5.915,1	-5,3%
retail DVD discs shipped to trade	m	64,6	132,3	256,5	418,6	615,4	646,0	5,0%
average trade price	euro	16,0	15,1	13,8	11,4	10,1	9,2	-9,8%

Consumer level: VHS retail

spending on retail VHS	euro m	3.627,8	3.285,5	3.070,4	1.938,1	929,5	287,5	-69,1%
retail cassettes sold to consumers	m	278,9	268,0	264,9	187,4	111,1	38,6	-65,2%
average consumer price	euro	13,0	12,3	11,6	10,3	8,4	7,4	-11,0%

Consumer level: DVD retail

spending on retail DVD	euro m	1.270,1	2.781,7	5.198,8	7.185,4	9.253,1	9.230,2	-0,2%
DVD discs sold to consumers	m	52,7	119,5	241,0	400,1	574,2	657,2	14,4%
average consumer price	euro	24,1	23,3	21,6	18,0	16,1	14,0	-12,8%



VIDEO MARKET: EUROPE



	2000	2001	2002	2003	2004	2005	change 05/04
--	------	------	------	------	------	------	-----------------

RENTAL VIDEO MARKET

video rental outlets	no	37.257	36.357	36.019	36.300	31.739	31.357	-1,2%
rental chains with 10 or more outlets	no	143	142	151	184	175	182	4,0%

Trade level: VHS rental

revenues from rental VHS	euro m	718,9	699,5	541,7	330,5	133,4	30,9	-76,9%
rental cassettes shipped to trade	m	23,9	24,7	21,5	14,1	7,2	2,3	-68,6%

average trade price	euro	30,1	28,3	25,2	23,5	18,4	13,6	-26,2%
number of titles released	no							

Trade level: DVD rental

revenues from rental DVD	euro m	48,3	124,5	315,6	500,9	614,4	645,1	5,0%
rental discs shipped to trade	m	2,5	5,8	13,7	22,3	30,2	33,1	9,5%

average trade price	euro	19,4	21,5	23,1	22,5	20,3	19,5	-4,1%
---------------------	------	------	------	------	------	------	------	-------

Consumer level: VHS rental

spending on VHS rental	euro m	2.302,8	2.142,3	1.784,5	1.049,7	474,2	121,0	-74,5%
VHS rental transactions	m	791,4	733,6	602,1	363,1	172,5	47,8	-72,3%

average rental charge	euro	2,9	2,9	3,0	2,9	2,7	2,5	-7,9%
-----------------------	------	-----	-----	-----	-----	-----	-----	-------

Consumer level: DVD rental

spending on DVD rental	euro m	96,5	315,7	943,6	1.630,0	2.191,2	2.379,7	8,6%
DVD rental transactions	m	28,3	92,6	271,2	490,8	673,1	753,0	11,9%

average rental price	euro	3,4	3,4	3,5	3,3	3,3	3,2	-2,9%
----------------------	------	-----	-----	-----	-----	-----	-----	-------

Source: Screen Digest/IVF

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