

## Europe: key data

# Europe



	All Europe	West Europe
Population	603m	391m
Households	239m	165m
TV households	227m	159m
VCR households	152m (67%)	122m (77%)
DVD player/recorder households	59,8m (26,4%)	57,3m (36,1%)
<b>Total distributor revenues from video software</b>	<b>€ 6,9bn</b>	<b>€ 6,8bn</b>
<b>Total consumer spending on video software</b>	<b>€ 12,5bn</b>	<b>€ 12,3bn</b>

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

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### Impressive DVD Market Performance Secures Growth Overall

In 2003, consumer spending on the rental and purchase of videocassettes and DVDs in Europe reached EUR 12.5 billion for the first time. This represents an increase of 9.1 per cent on the previous year's figure. And it is the progress made by DVD – the fastest growing home entertainment product in history – towards the mainstream that has made this possible.



## VIDEO MARKET: EUROPE



	1998	1999	2000	2001	2002	2003	change 03/02
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### EXCHANGE RATES

exchange rate: \$1=	Euro	0,89	0,94	1,08	1,12	1,06	0,88	
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### GENERAL

population	m	596,6	599,4	601,0	601,5	602,2	603,0	0,1%
households	m	231,6	233,1	234,7	236,6	237,8	239,4	0,7%

### HARDWARE

TV households	m	217,9	219,4	221,7	223,9	225,2	226,9	0,8%
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#### VCR sector

VCR households	m	129,1	134,7	140,3	144,9	149,6	152,0	1,6%
VCR penetration of TV households	%	59,2	61,4	63,3	64,7	66,4	67,0	0,8%

#### DVD sector

DVD Video player/recorder HHs	m	0,2	1,5	5,2	13,8	30,8	59,8	94,3%
Penetration of DVD Video player/recorders	%	0,1	0,7	2,3	6,2	13,7	26,4	92,8%

DVD console households	m			0,66	5,28	12,05	16,09	33,5%
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Penetration of DVD Video consoles	%			0,3	2,4	5,4	7,1	32,5%
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### TOTAL VIDEO SOFTWARE MARKET

#### Trade level

total revenues from video software	euro m	3.301,6	3.333,4	4.261,2	4.943,3	6.412,0	6.906,6	7,7%
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#### Consumer level

total spending on video software	euro m	6.471,8	6.559,1	7.757,0	9.023,9	11.629,6	12.532,0	7,8%
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## VIDEO MARKET: EUROPE



	1998	1999	2000	2001	2002	2003	change 03/02
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### RETAIL VIDEO MARKET

outlets stocking retail video	no	63.945	63.837	65.537	65.520	66.939	64.895	-3,1%
retail chains with 10 or more outlets	no	242	241	246	221	220	170	-22,7%
kiosks stocking retail video	no	75.340	88.190	93.320	83.820	78.320	76.910	

#### Trade level: VHS retail

revenues from retail VHS	euro m	2.604,9	2.295,6	2.444,4	2.083,1	1.924,6	1.075,5	-44,1%
retail cassettes shipped to trade	m	322,6	297,1	309,9	289,0	286,4	191,6	-33,1%
average trade price	euro	8,1	7,7	7,9	7,2	6,7	5,6	-16,5%
number of titles released	no	26.791	24.522	22.217	22.325	18.900	12.469	-34,0%

#### Trade level: DVD retail

revenues from retail DVD	euro m	46,8	331,4	1.039,9	2.032,6	3.645,9	5.025,3	37,8%
retail DVD discs shipped to trade	m	3,0	21,0	65,3	134,9	271,5	457,2	68,4%
average trade price	euro	15,5	15,8	15,9	15,1	13,4	11,0	-18,1%
number of titles released	no	2.933	9.779	15.979	27.678	32.420	33.566	3,5%

#### Consumer level: VHS retail

spending on retail VHS	euro m	4.310,8	3.956,1	3.955,6	3.572,5	3.276,9	2.025,7	-38,2%
retail cassettes sold to consumers	m	318,3	292,8	297,3	283,8	277,3	194,2	-30,0%
average consumer price	euro	13,5	13,5	13,3	12,6	11,8	10,4	-11,7%

#### Consumer level: DVD retail

spending on retail DVD	euro m	52,0	413,2	1.389,9	2.978,8	5.655,4	8.009,8	41,6%
DVD discs sold to consumers	m	1,9	15,9	54,6	123,5	256,9	439,9	71,3%
average consumer price	euro	26,8	26,0	25,5	24,1	22,0	18,2	-17,3%



## VIDEO MARKET: EUROPE



	1998	1999	2000	2001	2002	2003	change 03/02
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### RENTAL VIDEO MARKET

video rental outlets	no	42.193	37.920	36.357	35.557	31.409	29.170	-7,1%
rental chains with 10 or more outlets	no	192	189	141	140	139	133	-4,3%

#### Trade level: VHS rental

revenues from rental VHS	euro m	649,9	696,6	726,8	701,6	528,3	315,1	-40,4%
rental cassettes shipped to trade	m	18,2	20,6	24,1	24,8	21,7	14,0	-35,6%
average trade price	euro	35,7	33,8	30,2	28,3	24,4	22,6	-7,3%
number of titles released	no	8.659	10.877	11.085	10.996	9.584	7.157	-25,3%

#### Trade level: DVD rental

revenues from rental DVD	euro m		9,8	50,1	126,0	313,1	490,7	56,7%
rental discs shipped to trade	m		0,5	2,6	5,9	13,8	22,4	62,1%
average trade price	euro		18,8	19,5	21,5	22,7	21,9	-3,3%
number of titles released for rental	no		7.846	12.896	19.435	13.179	9.963	-24,4%

#### Consumer level: VHS rental

spending on VHS rental	euro m	2.108,9	2.173,1	2.312,8	2.154,8	1.753,9	974,1	-44,5%
VHS rental transactions	m	748,3	797,8	798,1	742,1	592,8	328,8	-44,5%
average rental charge	euro	2,8	2,7	2,9	2,9	3,0	3,0	0,1%

#### Consumer level: DVD rental

spending on DVD rental	euro m		16,7	98,8	317,8	943,3	1.522,4	61,4%
DVD rental transactions	m		5,6	29,8	94,0	273,0	447,0	63,7%
average rental price	euro		3,0	3,3	3,4	3,5	3,4	-1,4%

Source: Screen Digest/IVF

Data covers 17 West European and 5 key Central/Eastern European countries

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