

Europe: key data 2004

Europe



	All Europe	West Europe
Population	603m	392m
Households	241m	166m
TV households	229m	160m
VCR households	150m	117m
VCR households	65,4%	72,8%
DVD player/recorder households	89m	84m
DVD player/recorder penetration	39,0%	52,3%
Total distributors revenues from video software	€ 7,4bn	e 7,3bn
Total consumer spending on video software	€ 13,0bn	e 12,7bn

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

Impressive DVD Market Performance Secures Growth Overall

In 2004, consumer spending on the rental and purchase of videocassettes and DVDs in Europe reached EUR 13.0 billion for the first time. This represents an increase of 7.8 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



	1999	2000	2001	2002	2003	2004	change 04/03
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EXCHANGE RATES

exchange rate: \$1=	Euro	0,94	1,08	1,12	1,06	0,88	0,80	
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GENERAL

population	m	599,37	601,00	601,53	602,25	602,96	603,40	
0,1%households	m	233,13	234,68	236,63	237,78	239,37	240,90	0,6%

HARDWARE

TV households	m	219,4	221,7	223,9	225,2	226,9	228,7	0,8%
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VCR sector

VCR households	m	134,9	140,6	145,2	149,9	151,6	149,6	-1,3%
VCR penetration of TV households	%	61,5	63,4	64,9	66,6	66,8	65,4	-2,0%

DVD sector

DVD Video player/recorder HHs	m	1,5	5,2	13,8	30,9	60,7	89,3	47,1%
Penetration of DVD Video player/recorders	%	0,7	2,4	6,2	13,7	26,7	39,0	46,0%

DVD console households	m		0,7	5,3	12,1	19,2	22,0	14,7%
Penetration of DVD Video consoles	%		0,3	2,4	5,4	8,4	9,6	13,8%

TOTAL VIDEO SOFTWARE MARKET

TRADE LEVEL

total revenues from video software	euro m	3.281,2	4.204,8	4.880,2	6.304,6	6.721,9	7.435,1	10,6%
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CONSUMER LEVEL

total spending on video software	euro m	6.262,2	7.450,1	8.709,2	11.271,6	12.042,0	12.972,5	7,7%
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VIDEO MARKET: EUROPE



	1999	2000	2001	2002	2003	2004	change 04/03
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RETAIL VIDEO MARKET

outlets stocking retail video	no	64.962	66.662	66.645	70.045	66.911	57.767	-4,5%
retail chains with 10 or more outlets	no	248	253	253	252	252	190	
kiosks stocking retail video	no	88.190	93.320	83.830	80.370	79.480	79.430	

Trade level: VHS retail

revenues from retail VHS	euro m	2.248,3	2.402,1	2.054,9	1.912,2	1.119,5	504,8	-54,9%
retail cassettes shipped to trade	m	290,8	301,5	281,0	279,5	190,5	112,7	-40,9%

average trade price	euro	7,7	8,0	7,3	6,8	5,9	4,5	-23,8%
number of titles released	no	25.222,1	22.916,6	23.024,6	20.036,5	17.053,0	10.859,1	-36,3%

Trade level: DVD retail

revenues from retail DVD	euro m	335,8	1.035,5	2.001,3	3.535,1	4.771,0	6.183,5	29,6%
retail DVD discs shipped to trade	m	21,6	64,6	132,3	256,5	418,6	614,8	46,9%

average trade price	euro	15,6	16,0	15,1	13,8	11,4	10,1	-11,8%
number of titles released	no	9.979,2	16.228,7	27.978,2	33.420,0	42.149,0	47.221,8	12,0%

Consumer level: VHS retail

spending on retail VHS	euro m	3.691,8	3.751,8	3.396,6	3.204,1	2.005,1	965,2	-51,9%
retail cassettes sold to consumers	m	277,5	279,4	266,3	270,4	189,6	112,5	-40,6%

average consumer price	euro	13,3	13,4	12,8	11,8	10,6	8,6	-18,9%
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Consumer level: DVD retail

spending on retail DVD	euro m	392,7	1.299,0	2.854,6	5.342,5	7.371,3	9.389,0	27,4%
DVD discs sold to consumers	m	15,9	52,7	119,5	241,0	399,8	573,1	43,3%

average consumer price	euro	24,8	24,7	23,9	22,2	18,4	16,4	-11,1%
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VIDEO MARKET: EUROPE



	1999	2000	2001	2002	2003	2004	change 04/03
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VIDEO RENTAL MARKET

video rental outlets	no	38.910	37.257	36.357	36.019	36.301	24.349	-32,9%
rental chains with 10 or more outlets	no	191	143	142	151	184	158	-14,1%

Trade level: VHS rental

revenues from rental VHS	euro m	688,4	718,9	699,5	541,7	330,5	136,3	-58,8%
rental cassettes shipped to trade	m	20,4	23,9	24,7	21,5	14,1	7,2	-48,8%

average trade price	euro	33,7	30,1	28,3	25,2	23,5	18,9	-19,4%
number of titles released	no	11.576,6	11.784,9	11.696,0	10.720,5	10.317,0	8.057,5	-21,9%

Trade level: DVD rental

revenues from rental DVD	euro m	8,7	48,3	124,5	315,6	500,9	610,5	21,9%
rental discs shipped to trade	m	0,5	2,5	5,8	13,7	22,3	29,7	33,5%

average trade price	euro	18,4	19,4	21,5	23,1	22,5	20,5	-8,7%
number of titles released for rental	no	8.045,9	13.145,8	19.734,8	13.747,0	12.957,0	10.471,6	-19,2%

Consumer level: VHS rental

spending on VHS rental	euro m	2.161,9	2.302,8	2.142,3	1.784,5	1.047,0	471,5	-55,0%
VHS rental transactions	m	789,8	791,4	733,6	602,1	362,6	172,7	-52,4%

average rental charge	euro	2,7	2,9	2,9	3,0	2,9	2,7	-5,4%
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Consumer level: DVD rental

spending on DVD rental	euro m	15,8	96,5	315,7	940,5	1.618,7	2.147,1	32,6%
DVD rental transactions	m	4,9	28,3	92,6	270,4	487,4	664,9	36,4%

average rental price	euro	3,2	3,4	3,4	3,5	3,3	3,2	-2,7%
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Source: Screen Digest/IVF

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