

## Europe: key data 2008

	All Europe	West Europe
TV households	236	166
VCR households	99	83
DVD player/recorder households	173	135
<b>Total distributors revenues</b> from video software	6.176	5.847
<b>Total consumer spending</b> on video software	10.458	9.949



**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

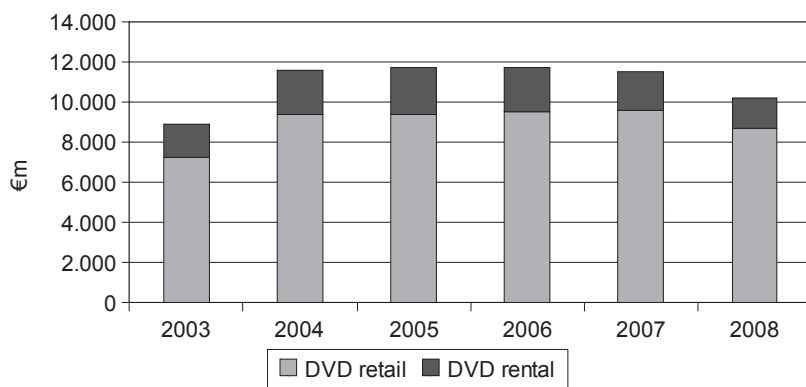
## The Industry Overview

DVD player penetration reached 73.3 per cent in Europe in 2008. Retail DVD continued to show growth in 2008 with volume sales increasing by 1.9 per cent.

Consumer spending on the rental and purchase of video software in Europe reached EUR 10.5 billion.

High-definition formats (predominantly Blu-ray Disc but also some HD DVD sales) contributed a further €265m to total European video spending in 2008.

DVD spending





## VIDEO MARKET: Europe

		2003	2004	2005	2006	2007	2008	change 08/07
<b>EXCHANGE RATES</b>								
exchange rate: \$1=	Euro	0,88	0,80	0,80	0,80	0,73	0,68	-6,9%
<b>GENERAL</b>								
population	m	488,15	489,60	491,58	493,22	494,79	496,33	
household	m	197,77	199,22	200,57	201,78	203,00	204,13	
<b>HARDWARE</b>								
TV households	m	228,5	230,3	232,0	233,8	235,2	236,3	0,5%
<b>VCR sector</b>								
VCR households	m	150,9	149,3	138,0	124,9	112,7	99,1	-12,0%
Penetration of TV households	%	66,0	64,8	59,5	53,4	47,9	42,0	
<b>DVD sector</b>								
DVD Video player/recorder HHS	m	59,0	90,3	121,9	145,7	161,9	173,2	6,9%
Penetration of TV households	%	25,8	39,2	52,6	62,3	68,9	73,3	
DVD console households	m	19,2	23,5	30,1	31,7	34,2	35,2	2,7%
Penetration of TV households	%	8,4	10,2	13,0	13,6	14,6	14,9	
<b>Blu-ray Disc sector</b>								
Blu-ray Disc standalone player HHS	m					0,06	0,82	1237,8%
Penetration of TV households	%					0,03	0,35	
PS3 console households	m					3,2	7,0	118,2%
Penetration of TV households	%					1,4	2,9	
<b>TOTAL VIDEO SOFTWARE MARKET</b>								
<b>TRADE LEVEL</b>								
total revenues from video software	Euro m	6.741,0	7.537,1	6.897,6	6.788,2	6.844,1	6.176,3	-9,8%
total revenues from retail video	Euro m	5.912,6	6.786,7	6.217,4	6.239,1	6.398,6	5.823,5	-9,0%
total revenues from rental video	Euro m	828,3	750,4	680,2	549,1	445,6	352,8	-20,8%
<b>CONSUMER LEVEL</b>								
total spending on video software	Euro m	11.862,0	12.980,2	12.145,5	11.765,1	11.579,3	10.458,3	-9,7%
total spending on retail video	Euro m	9.169,9	10.295,1	9.663,7	9.583,0	9.684,4	8.972,2	-7,4%
total spending on rental video	Euro m	2.692,1	2.685,0	2.481,9	2.182,2	1.894,9	1.486,1	-21,6%



## RETAIL VIDEO MARKET

### Trade level: VHS retail

revenues from retail VHS	Euro m	1.108,8	512,5	103,4	11,5			
retail cassettes shipped to trade	m	188,3	110,5	33,6	4,3			
average trade price	Euro	5,89	4,64	3,08	2,68			

### Trade level: DVD retail

revenues from retail DVD	Euro m	4.803,8	6.274,2	6.114,0	6.225,5	6.295,6	5.546,9	-11,9%
retail DVD discs shipped to trade	m	420,7	620,1	673,9	755,0	799,8	780,5	-2,4%
average trade price	Euro	11,42	10,12	9,07	8,25	7,87	7,11	-9,7%
		0	0	0	0	0	0	

### Trade level: Blu-ray Disc retail

revenues from BD	Euro m				0,6	74,3	271,8	265,8%
BD shipped to trade	m					4,3	17,4	308,5%
average trade price	Euro				17,22	17,45	15,62	-10,5%

### Trade level: HD DVD retail

revenues from HD DVD	Euro m				1,5	28,6	4,8	-83,1%
HD DVD shipped to trade	m				0,1	1,9	1,5	-22,4%
average trade price	Euro				16,72	15,19	3,30	-78,3%

### Consumer level: VHS retail

spending on retail VHS	Euro m	1.939,9	931,8	288,1	43,7	9,4	2,1	-77,5%
retail cassettes sold to consumers	m	186,8	110,7	38,4	9,0	2,3	0,5	-78,3%
average consumer price	Euro	10,39	8,41	7,51	4,86	4,14	4,29	3,7%

### Consumer level: DVD retail

spending on retail DVD	Euro m	7.230,0	9.363,4	9.375,6	9.538,7	9.594,6	8.705,5	-9,3%
DVD discs sold to consumers	m	402,3	582,1	668,2	722,3	764,0	778,2	1,9%
average consumer price	Euro	17,97	16,08	14,03	13,21	12,56	11,19	-10,9%

### Consumer level: Blu-ray Disc retail

spending on BD	Euro m				0,1	61,4	248,3	304,6%
BD sold to consumers	m					2,1	10,2	377,8%
average consumer price	Euro				27,61	28,84	24,42	-15,3%

### Consumer level: HD DVD retail

spending on HD DVD	Euro m				0,4	19,1	16,3	-14,4%
HD DVD sold to consumers	m					0,7	1,4	109,3%
average consumer price	Euro				26,93	27,73	11,34	-59,1%



### RENTAL VIDEO MARKET

#### Trade level: VHS rental

revenues from rental VHS	Euro m	330,5	135,2	32,0				
rental cassettes shipped to trade	m	14,0	7,3	2,3				
average trade price	Euro	23,54	18,59	13,65				

#### Trade level: DVD rental

revenues from rental DVD	Euro m	497,8	615,2	648,2	549,1	445,6	352,8	-20,8%
rental discs shipped to trade	m	22,3	30,2	33,2	29,6	25,9	22,6	-12,6%
average trade price	Euro	22,35	20,39	19,52	18,57	17,22	15,59	-9,4%

#### Consumer level: VHS rental

spending on VHS rental	Euro m	1.052,6	476,8	123,0	19,6	0,2		
VHS rental transactions	m	363,6	173,7	49,4	8,7	0,2		
average rental charge	Euro	2,90	2,74	2,49	2,27	1,00		

#### Consumer level: DVD rental

spending on DVD rental	Euro m	1.639,5	2.208,2	2.358,8	2.162,5	1.894,7	1.486,1	-21,6%
DVD rental transactions	m	492,1	674,6	733,0	672,2	593,4	492,4	-17,0%
average rental price	Euro	3,33	3,27	3,22	3,22	3,19	3,02	-5,5%

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