

Europe: key data 2006

Europe



	All Europe	West Europe
Population	609	398
Households	244	168
TV households	235	165
VCR households	124	103
DVD player/recorder households	142	118
Total distributors revenues from video software	6 747	6 447
Total consumer spending on video software	11.621	11.129

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 60 per cent in Europe in 2006. Retail DVD continued to show strong growth in 2006 with volume sales increasing by 10 per cent.

Consumer spending on the rental and purchase of videocassettes and DVDs in Europe reached EUR 11.6 billion.

The DVD format has now almost entirely replaced VHS in the European retail video market, accounting for 98 per cent of total European video sales (728 m units).



VIDEO MARKET: EUROPE



	1999	2000	2001	2002	2003	2004	2005	2006	change 06/05
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EXCHANGE RATES

exchange rate: Euro 1=

exchange rate: \$1=

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

population	m	597,23	552,38	599,25	600,09	601,06	602,02	603,60	605,01	0,2%
households	m	231,13	233,61	236,03	238,04	239,45	241,04	242,74	244,08	0,6%

HARDWARE

TV households	m	219,8	223,0	225,6	227,8	229,5	231,3	233,3	234,9	0,7%
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VCR sector

VCR households	m	134,4	139,9	144,7	149,5	151,2	149,2	137,4	123,6	-10,1%
VCR penetration of TV households	%	61,1	62,7	64,1	65,6	65,9	64,5	58,9	52,6	

DVD sector

DVD Video player/recorder HHs	m	1,5	5,2	13,8	30,9	59,5	90,0	121,8	141,9	16,5%
Penetration of DVD Video player/recorders	%	0,7	2,3	6,1	13,5	25,9	38,9	52,2	60,4	

DVD console households	m		0,7	5,3	12,1	19,2	23,5	30,1	31,7	
Penetration of DVD Video consoles	%		0,3	2,3	5,3	8,3	10,2	12,9	13,5	

TOTAL VIDEO SOFTWARE MARKET

TRADE LEVEL

total revenues from video software	euro m	3.206,0	4.147,9	4.839,6	6.274,5	6.706,8	7.504,9	6.678,3	6.747,2	1,0%
total revenues from retail video	euro m	2.509,6	3.380,7	4.015,9	5.416,4	5.879,1	6.756,1	6.000,4	6.185,8	3,1%
total revenues from rental video	euro m	696,4	767,2	823,7	858,1	827,7	748,8	677,9	561,5	-17,2%

CONSUMER LEVEL

total spending on video software	euro m	6.115,5	7.293,9	8.524,8	10.997,6	11.799,2	12.862,3	12.043,1	11.621,4	-3,5%
total spending on retail video	euro m	3.937,8	4.894,6	6.066,8	8.270,6	9.131,7	10.201,5	9.587,3	9.446,7	-1,5%
total spending on rental video	euro m	2.177,7	2.399,3	2.458,0	2.727,0	2.667,5	2.660,8	2.455,8	2.174,7	-11,4%



VIDEO MARKET: EUROPE



1999 2000 2001 2002 2003 2004 2005 2006 change
06/05

RETAIL VIDEO MARKET

		1999	2000	2001	2002	2003	2004	2005	2006	
outlets stocking retail video	no	64.762	66.462	66.445	69.845	66.711	65.820	65.770	65.685	
retail chains with 10 or more outlets	no	248	253	253	252	252	226	233	228	
kiosks stocking retail video	no	88.190	93.320	83.830	80.370	79.480	79.430	81.360	81.360	

Trade level: VHS retail

revenues from retail VHS										
revenues from retail VHS	euro m	2.173,8	2.345,1	2.013,4	1.882,0	1.108,8	512,2	103,8	18,7	-82,0%
retail cassettes shipped to trade	m	279,7	291,5	273,2	274,0	188,3	110,6	33,3	8,2	-75,2%
average trade price										
average trade price	euro	7,8	8,0	7,4	6,9	5,9	4,6	3,1	2,3	-27,4%
number of titles released										

Trade level: DVD retail

revenues from retail DVD										
revenues from retail DVD	euro m	335,8	1.035,5	2.002,4	3.534,4	4.770,3	6.243,9	5.896,7	6.167,1	4,6%
retail DVD discs shipped to trade	m	21,6	64,6	132,4	256,5	418,3	615,9	662,3	753,1	13,7%
average trade price	Kuna									
average trade price	euro	15,6	16,0	15,1	13,8	11,4	10,1	8,9	8,2	-8,0%
number of titles released										

Consumer level: VHS retail

spending on retail VHS										
spending on retail VHS	euro m	3.552,7	3.625,4	3.284,7	3.075,0	1.937,1	929,5	287,5	55,2	-80,8%
retail cassettes sold to consumers	m	275,4	278,9	268,0	265,2	187,4	111,1	38,6	10,5	-72,9%
average consumer price										
average consumer price	euro	12,9	13,0	12,3	11,6	10,3	8,4	7,5	5,3	-29,2%

Consumer level: DVD retail

spending on retail DVD										
spending on retail DVD	euro m	385,1	1.269,2	2.782,1	5.195,5	7.194,5	9.272,1	9.299,8	9.391,5	1,0%
DVD discs sold to consumers	m	15,9	52,7	119,5	241,0	400,0	574,1	663,5	727,6	9,7%
average consumer price										
average consumer price	euro	24,3	24,1	23,3	21,6	18,0	16,1	14,0	12,9	-7,9%



VIDEO MARKET: EUROPE



	1999	2000	2001	2002	2003	2004	2005	2006	change 06/05
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RENTAL VIDEO MARKET

video rental outlets	no	38.910	37.257	36.357	36.019	36.300	34.696	34.234	27.304	
rental chains with 10 or more outlets	no	191	143	142	151	184	175	182	168	

Trade level: VHS rental

revenues from rental VHS										
revenues from rental VHS	euro m	687,7	718,9	699,4	541,7	330,5	133,4	30,9	5,0	-83,8%
rental cassettes shipped to trade	m	20,4	23,9	24,6	21,5	14,0	7,2	2,3	0,4	-83,0%
average trade price										
average trade price	euro	33,7	30,1	28,4	25,2	23,5	18,5	13,4	12,7	-4,7%
number of titles released										

Trade level: DVD rental

revenues from rental DVD										
revenues from rental DVD	euro m	8,7	48,3	124,3	316,4	497,1	615,5	647,0	556,5	-14,0%
rental discs shipped to trade	m	0,5	2,5	5,8	13,7	22,2	30,2	33,2	30,2	-8,9%
average trade price										
average trade price	euro	18,4	19,4	21,5	23,1	22,4	20,4	19,5	18,4	-5,6%
number of titles released for rental										

Consumer level: VHS rental

spending on VHS rental										
spending on VHS rental	euro m	2.161,9	2.302,8	2.142,3	1.784,5	1.049,7	474,2	120,5	24,2	-79,9%
VHS rental transactions	m	789,8	791,4	733,6	602,1	363,1	172,5	48,2	11,7	-75,7%
average rental charge										
average rental charge	euro	2,74	2,91	2,92	2,96	2,89	2,75	2,50	2,07	-17,3%

Consumer level: DVD rental

spending on DVD rental										
spending on DVD rental	euro m	15,8	96,5	315,7	942,6	1.617,8	2.186,6	2.335,3	2.150,4	-7,9%
DVD rental transactions	m	4,9	28,3	92,6	270,8	486,4	670,4	727,5	668,3	-8,1%
average rental price										
average rental price	euro	3,24	3,41	3,41	3,48	3,33	3,26	3,21	3,22	0,2%

Source: Screen Digest/IVF

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