

Europe

Europe: key data

TV households	237m
DVD player/recorder households	179m
Blu-ray Disc standalone player households	3m
Total distributor revenues from video software	€ 5,492m
Total consumer spending on video software	€ 9,502m



Data for West Europe covers Austria, Belgium, Denmark, Finland, France, Germany, Greece, Iceland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, UK

Data for Central/Eastern Europe covers Croatia, Czech Republic, Hungary, Poland, Russia

The industry overview

In 2009, European consumers spent EUR 9.5bn buying and renting DVDs and Blu-ray Discs (BD), a decline of 9.3 per cent compared to 2008.

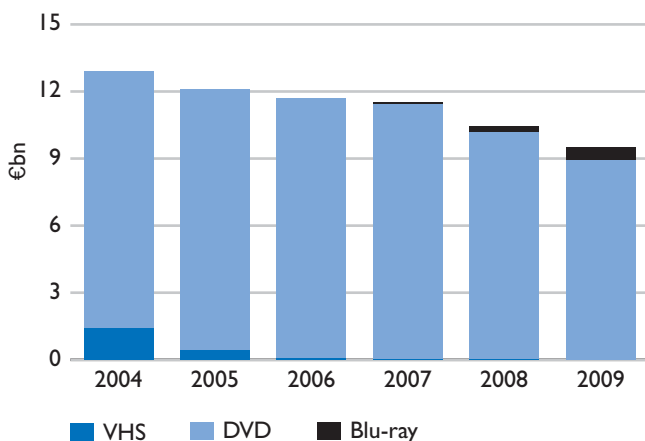
The European video market continued to be led by standard-definition DVD which accounted for 96.6 per cent of total video volume sales.

Total spending on Blu-ray Discs more than doubled in 2009, reaching a total of EUR 597.3m.

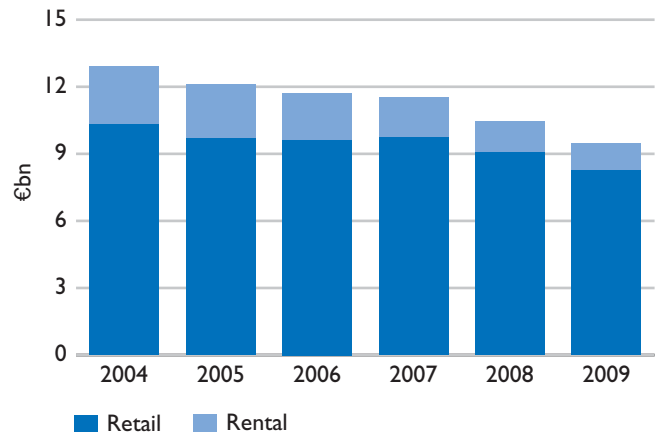
The number of BD-enabled households in Europe continued to grow. In 2009, there were 14.6m households in Europe with either a standalone BD player or a Sony PlayStation 3 games console.

For a full analysis of the European video market see page 9.

Consumer spending by format



Consumer spending by sector



Video market: Europe

		2004	2005	2006	2007	2008	2009	09/08
EXCHANGE RATES								
Exchange rate: \$1 =	Euro	0.80	0.80	0.80	0.73	0.68	0.72	
GENERAL								
population	m	603.4	604.9	606.2	607.6	608.7	609.6	0.2%
household	m	241.2	242.5	244.1	245.3	246.4	247.5	0.5%
HARDWARE								
TV households	m	230.3	232.0	233.8	235.1	236.3	237.5	0.5%
DVD sector								
DVD Video player/recorder HHs	m	90.3	121.9	145.6	161.9	173.2	179.4	3.6%
Penetration of TV households	%	39.2	52.6	62.3	68.9	73.3	75.6	
DVD console households	m	25.7	31.5	33.1	34.4	36.1	38.1	5.6%
Penetration of TV households	%	11.2	13.6	14.2	14.6	15.3	16.0	
Blu-ray Disc sector								
BD standalone player HHs	m			0.001	0.062	0.8	3.1	283.1%
Penetration of TV households	%			0.000	0.027	0.3	1.3	
PS3 console households	m				3.2	7.0	11.5	64.3%
Penetration of TV households	%				1.4	3.0	4.8	

Total video software market

		2004	2005	2006	2007	2008	2009	09/08
TRADE LEVEL								
Total revenues from video software	Euro m	7,539.1	6,893.9	6,773.0	6,863.9	6,196.2	5,492.2	-11.4%
Total revenues from retail video	Euro m	6,787.9	6,212.9	6,232.6	6,420.1	5,840.5	5,206.7	-10.9%
Total revenues from rental video	Euro m	751.2	681.0	540.4	443.7	355.7	285.5	-19.7%
CONSUMER LEVEL								
Total spending on video software	Euro m	12,896.0	12,094.6	11,680.7	11,537.4	10,473.2	9,502.1	-9.3%
Total spending on retail video	Euro m	10,297.0	9,699.4	9,619.2	9,725.1	9,063.5	8,250.1	-9.0%
Total spending on rental video	Euro m	2,599.0	2,395.2	2,061.5	1,812.2	1,409.7	1,252.0	-11.2%

Retail video market

		2004	2005	2006	2007	2008	2009	09/08
Outlets stocking retail video	no	65,820	65,770	64,812	62,570	60,570	60,270	
Retail chains with 10 or more outlets	no	226	233	228	223	217	208	
Kiosks stocking retail video	no	79,430	81,360	81,360	81,360	81,360	81,360	
Trade level: DVD retail								
Revenues from retail DVD	Euro m	6,275.4	6,109.5	6,219.0	6,315.7	5,555.1	4,745.9	-14.6%
Retail DVD shipped to trade	m	620.3	672.7	752.7	806.9	788.9	762.7	-3.3%
Average trade price	Euro	10.12	9.08	8.26	7.83	7.04	6.22	-11.6%
Trade level: Blu-ray Disc retail								
Revenues from BD	Euro m			0.596	75.8	280.5	459.6	63.9%
Retail BD shipped to trade	m			0.035	4.3	17.6	35.3	100.3%
Average trade price	Euro			17.22	17.65	15.91	13.02	-18.2%
Consumer level: DVD retail								
Spending on retail DVD	Euro m	9,365.2	9,411.3	9,575.0	9,635.3	8,790.2	7,692.9	-12.5%
DVDs sold to consumers	m	582.3	667.0	718.5	764.7	780.1	752.3	-3.6%
Average consumer price	Euro	16.08	14.11	13.33	12.60	11.27	10.23	-9.3%
Average consumer price								
Consumer level: Blu-ray Disc retail								
Spending on retail BD	Euro m			0.146	61.5	254.4	556.7	118.8%
Retail BD sold to consumers	m			0.005	2.1	10.2	26.7	161.6%
Average consumer price	Euro			27.61	28.86	24.91	20.83	-16.4%

Rental video market

		2004	2005	2006	2007	2008	2009	09/08
Video rental outlets	no	35,056	34,574	31,017	27,996	24,955	23,721	
Rental chains with 10 or more outlets	no	140	136	132	126	125	118	

Trade level: DVD rental

Revenues from rental DVD	Euro m	615.9	649.0	540.4	443.1	351.8	271.3	-22.9%
Rental discs shipped to trade	m	30.2	33.3	29.2	25.5	22.3	20.0	-10.6%
Average trade price	Euro	20.39	19.51	18.52	17.36	15.76	13.59	-13.8%

Trade level: BD rental

Revenues from rental BD	Euro m				0.622	3.9	14.2	265.0%
Rental discs shipped to trade	m				0.030	0.2	0.9	330.4%
Average trade price	Euro				20.99	17.84	15.13	-15.2%

Consumer level: DVD rental

Spending on DVD rental	Euro m	2,121.9	2,272.1	2,041.8	1,810.9	1,402.1	1,211.3	-13.6%
DVD rental transactions	m	657.1	708.6	639.6	565.3	465.3	406.8	-12.6%
Average rental price	Euro	3.23	3.21	3.19	3.20	3.01	2.98	-1.2%

Consumer level: BD rental

Spending on BD rental	Euro m				0.958	7.5	40.7	441.0%
BD rental transactions	m				0.251	2.5	13.4	435.4%
Average rental price	Euro				3.82	3.01	3.04	1.0%

Source: Screen Digest/IVF

Population and household figures: Economist Intelligence Unit

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