

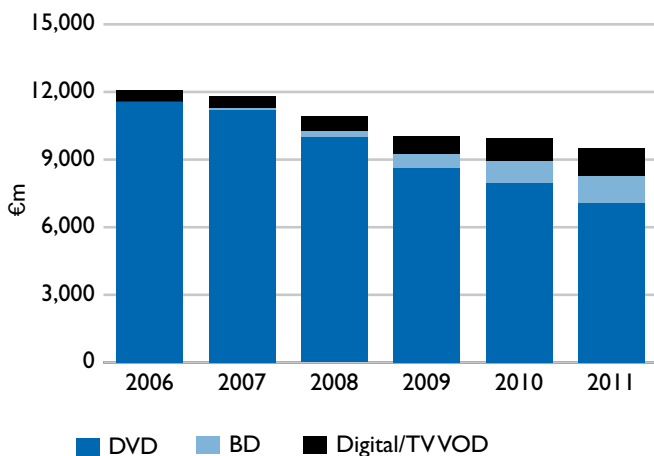
Europe

Europe: key data

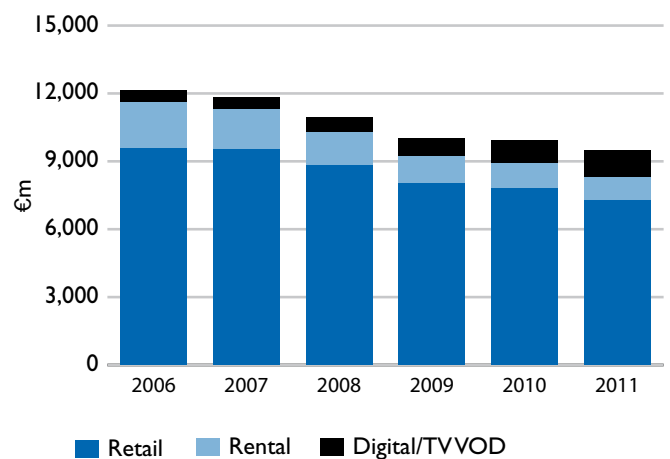
Population	611.3m
TV households	246.7m
DVD Video player/recorder	75.8%
Blu-ray Disc player/recorders penetration	7.1%
Distributor revenues from physical video software	€ 5bn
Comparison with 2010	-9.5%
DVD/ Blu-ray Disc split	€ 4.1bn / € 843.2m
Video software rental/retail split (%)	4 / 96
Consumer spending on physical video software	€ 8.3bn
Comparison with 2010	-7.4%
DVD/ Blu-ray Disc split	€ 7.1bn / € 1.2bn
Video software rental/retail split (%)	12 / 88
Consumer spending on digital video and TV VOD	€ 1.2bn
Comparison with 2010	19.9%
Digital video/TVVOD split (%)	70 / 30



Consumer spending by format



Consumer spending by sector



Video market: Europe

		2006	2007	2008	2009	2010	2011	10/11
EXCHANGE RATES								
Exchange rate: \$1=	Euro	0.80	0.73	0.68	0.72	0.75	0.72	
GENERAL								
Population	m	605.7	606.9	608.2	609.3	610.3	611.3	0.2%
Households	m	244.0	245.9	247.6	249.3	251.0	252.6	0.7%
HARDWARE								
TV households	m	236.6	238.9	240.9	242.9	244.8	246.7	0.8%
DVD sector								
DVD Video player/recorder households	m	146.7	163.8	174.9	180.8	184.5	187.1	1.4%
Penetration of TV households	%	62.0	68.6	72.6	74.4	75.4	75.8	
DVD console households	m	33.7	35.2	37.3	39.6	41.6	43.2	3.9%
Penetration of TV households	%	14.2	14.8	15.5	16.3	17.0	17.5	
BD sector								
BD standalone player households	m	0.001	0.063	0.8	3.2	8.4	17.4	108.6%
Penetration of TV households	%	0.000	0.026	0.3	1.3	3.4	7.1	
PS3 console households	m		3.2	7.0	11.4	15.7	19.9	26.8%
Penetration of TV households	%		1.4	2.9	4.7	6.4	8.1	

Total video software market

		2006	2007	2008	2009	2010	2011	10/11
TRADE LEVEL PHYSICAL VIDEO								
<i>Total market figures include revenues from legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.</i>								
Total revenues from video software	Euro m	6,769.2	6,857.0	6,201.9	5,502.3	5,482.0	4,963.1	-9.5%
Total revenues from retail video	Euro m	6,229.5	6,413.6	5,847.1	5,221.3	5,242.5	4,767.6	-9.1%
Total revenues from rental video	Euro m	539.7	443.4	354.8	281.0	239.5	195.6	-18.3%
CONSUMER LEVEL VIDEO								
<i>Total market figures include spending on both physical and digital video</i>								
Total spending on video	Euro m	12,124.2	11,850.4	10,958.6	10,022.5	9,950.2	9,493.8	-4.6%
CONSUMER LEVEL PHYSICAL VIDEO								
<i>Total market figures include spending on legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.</i>								
Total spending on video software	Euro m	11,629.7	11,284.9	10,269.6	9,234.5	8,938.7	8,281.0	-7.4%
Total spending on retail video	Euro m	9,577.3	9,530.6	8,832.4	7,999.3	7,798.2	7,248.4	-7.0%
Total spending on rental video	Euro m	2,052.4	1,754.3	1,437.2	1,235.2	1,140.6	1,032.6	-9.5%

Video market: Europe

		2006	2007	2008	2009	2010	2011	10/11
CONSUMER LEVEL DIGITAL VIDEO								
<i>The purchase or rental of movies and TV series delivered over the open internet through transactional models (also known as EST, DTO, Internet VOD) or on a subscription basis.</i>								
Total spending on digital video	Euro m	28.3	48.6	84.7	138.4	257.0	364.4	41.8%
CONSUMER LEVEL TV VOD								
<i>The delivery of movies and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services.</i>								
Total spending on TV VOD	Euro m	466.2	516.9	604.3	649.6	754.5	848.4	12.5%

Retail video market

		2006	2007	2008	2009	2010	2011	10/11
Outlets stocking retail video	no.	51,312	50,820	51,570	49,802	47,990	38,729	
Retail chains with 10 or more outlets	no.	228	223	217	207	193	166	
Kiosks stocking retail video	no.	81,360	81,360	81,360	78,773	76,540	70,687	

Trade level: DVD retail

Revenues from retail DVD	Euro m	6215.6	6309.1	5565.6	4768.0	4530.4	3960.7	-12.6%
Retail DVD units shipped to trade	m	759.5	816.0	800.6	775.7	720.5	641.7	-10.9%
Average trade price	Euro	8.18	7.73	6.95	6.15	6.29	6.17	-1.8%
Number of titles released	no.							

Trade level: BD retail

Revenues from retail BD	Euro m	0.60	75.4	276.0	452.9	712.1	806.8	13.3%
Retail BD units shipped to trade	m	0.03	4.3	17.6	35.2	59.1	69.6	17.6%
Average trade price	Euro	17.22	17.55	15.67	12.85	12.04	11.60	-3.7%
Number of titles released	no.	106	1,640	4,688	8,297	11,215	150	

Consumer level: DVD retail

Spending on retail DVD	Euro m	9,533.0	9,443.6	8,558.8	7,445.8	6,907.6	6,142.3	-11.1%
Retail DVDs sold to consumers	m	713.0	761.2	777.1	741.2	676.8	614.3	-9.2%
Average consumer price	Euro	13.37	12.41	11.01	10.05	10.21	10.00	-2.0%

Consumer level: BD retail

Spending on retail BD	Euro m	0.15	61.8	253.0	552.6	890.2	1105.8	24.2%
Retail BDs sold to consumers	m	0.01	2.2	10.4	27.6	48.0	63.1	31.6%
Average consumer price	Euro	27.61	28.72	24.35	19.99	18.55	17.51	-5.6%

Rental video market

		2006	2007	2008	2009	2010	2011	10/11
<i>Rental video market data includes both store-based rental and physical rent-by-mail operations where relevant.</i>								
Video rental outlets	no.	30,617	27,296	23,226	21,536	18,232	12,259	
Rental chains with 10 or more outlets	no.	131	124	122	114	93	75	
Trade level: DVD rental								
Revenues from rental DVD	Euro m	539.3	442.8	350.8	267.1	211.6	159.2	-24.7%
Rental DVD units shipped to trade	m	29.1	25.5	22.4	19.8	16.5	14.3	-13.2%
Average trade price	Euro	18.51	17.35	15.68	13.51	12.80	11.11	-13.2%
Number of titles released	no.							
Trade level: BD rental								
Revenues from rental BD	Euro m		0.62	4.0	13.9	28.0	36.3	30.0%
Rental BD units shipped to trade	m		0.03	0.2	0.9	1.9	2.8	45.2%
Average trade price	Euro		21.41	18.20	15.37	14.42	12.91	-10.5%
Number of titles released	no.							
Consumer level: DVD rental								
Spending on DVD rental	Euro m	2,032.6	1,751.6	1,421.3	1,192.9	1,055.8	915.7	-13.3%
DVD rental transactions	m	640.7	557.8	479.7	417.1	361.9	318.3	-12.1%
Average rental price	Euro	3.17	3.14	2.96	2.86	2.92	2.88	-1.4%
Consumer level: BD rental								
Spending on BD rental	Euro m		2.4	15.8	42.2	84.8	116.9	37.7%
BD rental transactions	m		0.6	4.7	13.7	27.0	39.3	45.2%
Average rental price	Euro		4.08	3.36	3.07	3.14	2.98	-5.1%

Source: IHS Screen Digest/IVF

Population and household figures: IHS Global Insight

Notes:

1. Distributor level excludes and consumer level includes VAT/sales tax.

2. Historical numbers in the UK section of this yearbook differ from those published in previous years owing to a change in the BVA's data collection methodology. This change reduced the overall value of consumer level physical video between 2007 and 2011. In addition to this, IHS Screen Digest has restated the historically recorded size of the UK's physical video rental market. This change follows further research into the size of the store-based rental market. These changes have impacted the total physical market at a European level. As a result historical numbers stated in the European section differ from previous yearbooks.