

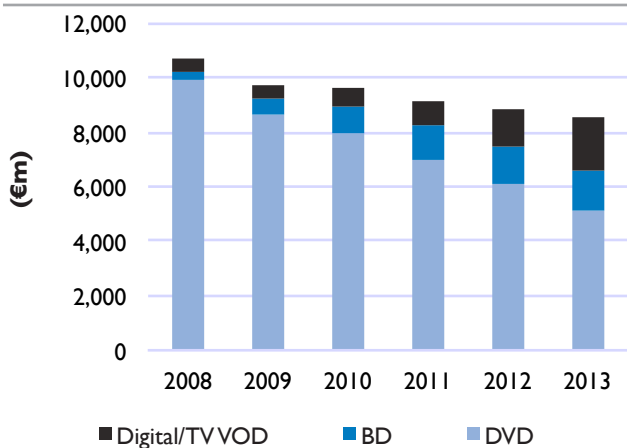
Europe

Europe: key data

Population	619.1m
TV households	253.1m
DVD Video player/recorder penetration	74.9%
Blu-ray Disc player/recorders penetration	17.3%
Consumer spending on physical video software	€ 6.5bn
Copmarison with 2012	-12.9%
DVD/ Blu-ray Disc split	€ 5.1bn / € 1.4bn
Video software rental/retail split (%)	11 / 89
Consumer spending on digital video and TVVOD	€ 2bn
Copmarison with 2012	42.9%
TVVOD/ Digital video split (%)	40 / 60



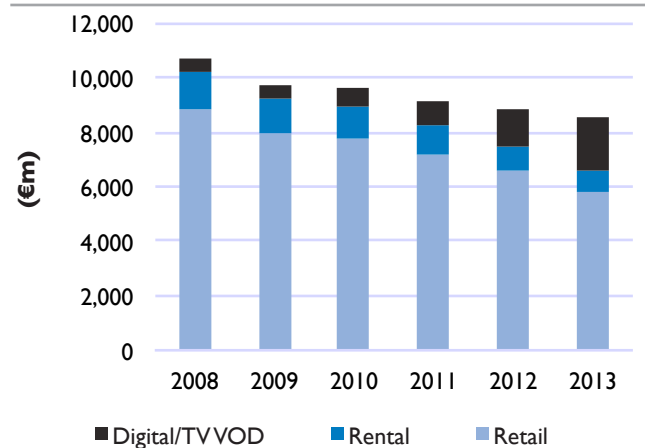
Consumer spending by format



Source: IHS/IVF

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Consumer spending by sector



Source: IHS/IVF

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Video market: Europe

		2008	2009	2010	2011	2012	2013	12/13
EXCHANGE RATES								
Exchange rate: \$1=	Euro	0.68	0.72	0.75	0.72	0.78	0.78	
GENERAL								
Population	m	613.7	614.9	615.9	616.8	617.5	618.2	0.1%
Households	m	249.2	251.0	252.7	254.3	255.9	257.5	0.6%
HARDWARE								
TV households	m	243.1	245.0	247.0	249.0	250.8	252.5	0.7%
DVD sector								
DVD Video player/recorder households	m	177.9	184.2	188.1	190.4	190.5	189.2	-0.7%
Penetration of TV households	%	73.2	75.2	76.2	76.5	76.0	74.9	-1.4%
DVD console households	m	37.1	39.3	41.2	42.9	41.4	36.7	-11.3%
Penetration of TV households	%	15.2	16.0	16.7	17.2	16.5	14.5	-11.9%
BD sector								
BD standalone player households	m	0.9	3.3	8.2	16.8	28.2	41.8	48.1%
Penetration of TV households	%	0.4	1.3	3.3	6.8	11.3	16.6	47.0%
PS3 console households	m	7.1	11.7	16.1	20.8	24.8	29.5	19.0%
Penetration of TV households	%	2.9	4.8	6.5	8.3	9.9	11.7	18.1%

Total video software market

		2008	2009	2010	2011	2012	2013	12/13
CONSUMER LEVEL ALL VIDEO								
<i>Total market figures include spending on both physical and digital video</i>								
Total spending on video	Euro m	10,698.1	9,753.7	9,644.2	9,150.4	8,877.9	8,502.9	-4.2%
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	10,216.3	9,179.6	8,903.9	8,213.3	7,498.7	6,532.2	-12.9%
Total spending on retail video	Euro m	8,795.3	7,936.9	7,750.2	7,176.9	6,588.3	5,801.9	-11.9%
Total spending on rental video	Euro m	1,421.0	1,242.7	1,153.7	1,036.4	910.4	730.4	-19.8%
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	63.3	119.9	236.2	363.4	685.0	1,183.4	72.8%
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 TVVOD	Euro m	418.5	454.3	504.1	573.7	694.2	787.2	13.4%

Retail video market

		2008	2009	2010	2011	2012	2013	12/13
Outlets stocking retail video	no.	51,570	49,802	47,940	39,369	29,910		
Retail chains with 10 or more outlets	no.	217	207	193	167	128		
Kiosks stocking retail video	no.	81,360	78,773	76,540	70,177	64,880		

Consumer level: DVD retail

Spending on retail DVD	Euro m	8,518.3	7,390.6	6,861.9	6,091.1	5,348.4	4,524.3	-15.4%
Retail DVDs sold to consumers	m	773.8	740.7	674.5	608.9	524.3	446.0	-14.9%
Average consumer price	Euro	11.01	9.98	10.17	10.00	10.20	10.14	-0.6%

Consumer level: BD retail

Spending on retail BD	Euro m	255.3	545.3	888.0	1,085.5	1,239.6	1,277.6	3.1%
Retail BDs sold to consumers	m	10.5	27.5	47.9	62.6	74.6	82.8	11.0%
Average consumer price	Euro	24.33	19.84	18.53	17.33	16.61	15.43	-7.1%

Rental video market

		2008	2009	2010	2011	2012	2013	12/13
<i>Rental video market data includes both store-based rental and physical rent-by-mail operations where relevant.</i>								
Video rental outlets	no.	23,608	21,862	18,155	14,092	10,870		
Rental chains with 10 or more outlets	no.	124	116	93	77	54	8	

Consumer level: DVD rental

Spending on DVD rental	Euro m	1,405.2	1,200.4	1,067.8	918.2	753.5	577.6	-23.3%
DVD rental transactions	m	467.9	416.3	357.4	310.3	247.4	185.5	-25.0%
Average rental price	Euro	3.00	2.88	2.99	2.96	3.05	3.11	2.3%

Consumer level: BD rental

Spending on BD rental	Euro m	15.7	42.3	85.9	118.1	156.9	152.8	-2.6%
BD rental transactions	m	4.7	13.8	27.1	39.2	50.4	45.8	-9.0%
Average rental price	Euro	3.32	3.06	3.17	3.01	3.12	3.34	7.1%

Source: IHS/IVF

Population and household figures: IHS Global Insight

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

Note: Consumer level digital video and TVVOD figures may differ from locally published figures due to the application of different definitions.