

Europe

Europe: key data

TV households	240.2m
DVD households (penetration)	77.0%
Blu-ray Disc household (penetration)	3.0%
Distributors revenues from physical video software	€ 5.5bn
Comparison with 2009	+0.1%
DVD/Blu-ray Disc split	€ 4.8bn / €765.2m
Video software rental/retail split	4/96
Consumer spending on physical video software	€ 9.2bn
Comparison with 2009	-2.3%
DVD/Blu-ray Disc split	€ 8.2bn / €970.8m
Video software rental/retail split	12/88



European consumer spending on video software on digital media (DVD and Blu-ray Disc) and online totalled EUR 9.9bn in 2010.

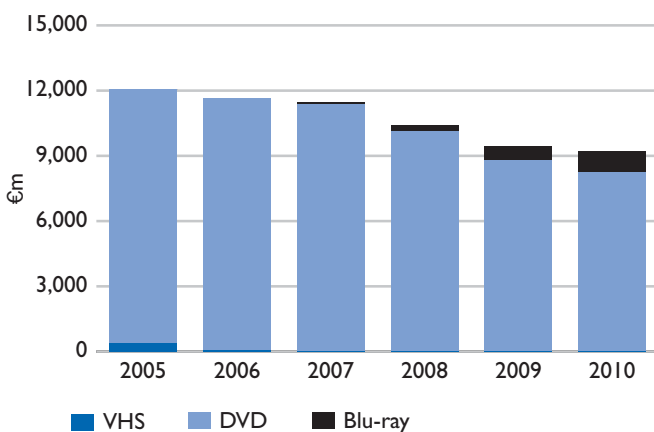
European consumers spent EUR 9.2bn on buying and renting DVDs and Blu-ray Discs in 2010, a 30.1 per cent share of worldwide video spending.

Total spending on Blu-ray discs increased by 60 per cent in 2010, reaching a total of EUR 906m.

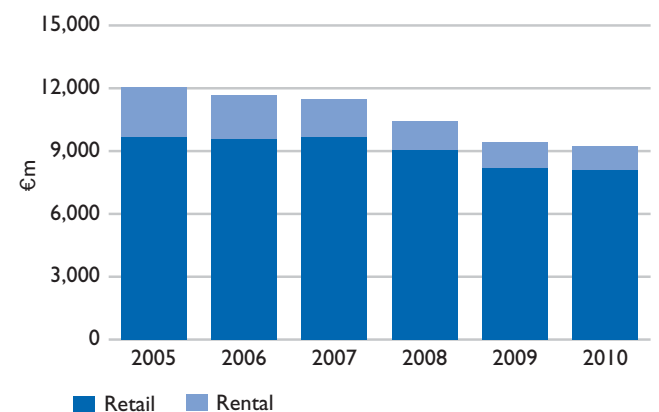
The number of BD-enabled households in Europe continued to grow.

In 2010, there were 23.2m households in Europe with either a stand-alone BD player or a Sony PlayStation 3 games console.

Consumer spending by format



Consumer spending by sector



Video market: Europe

		2005	2006	2007	2008	2009	2010	10/09
EXCHANGE RATES								
Exchange rate: \$1=	Euro	0.80	0.80	0.73	0.68	0.72	0.75	
GENERAL								
Population	m	492.4	494.5	496.5	498.5	500.1	501.7	0.3%
Households	m	200.6	201.8	203.1	204.3	205.3	206.4	0.5%
HARDWARE								
TV households	m	231.3	233.3	235.1	236.9	238.7	240.2	0.6%
DVD sector								
DVD Video player/recorder households	m	121.8	145.9	162.5	173.5	179.1	184.9	3.3%
Penetration of TV households	%	52.7	62.5	69.1	73.2	75.0	77.0	
DVD console households	m	31.8	33.7	35.2	37.3	39.6	41.5	4.9%
Penetration of TV households	%	13.7	14.4	15.0	15.7	16.6	17.3	
BD sector								
BD standalone player households	m		0.001	0.063	0.8	3.0	7.3	140.4%
Penetration of TV households	%		0.000	0.027	0.3	1.3	3.0	
PS3 console households	m			3.2	7.0	11.4	15.6	37.5%
Penetration of TV households	%			1.4	2.9	4.8	6.5	

Total video software market

		2005	2006	2007	2008	2009	2010	10/09
TRADE LEVEL PHYSICAL VIDEO								
Total revenues from video software	Euro m	6,889.5	6,768.8	6,857.5	6,208.6	5,515.2	5,520.1	0.1%
Total revenues from retail video	Euro m	6,208.3	6,229.5	6,413.5	5,852.9	5,233.5	5,283.1	0.9%
Total revenues from rental video	Euro m	681.2	539.3	443.9	355.6	281.7	237.0	-15.9%
CONSUMER LEVEL PHYSICAL VIDEO								
Total spending on video software	Euro m	12,055.8	11,644.7	11,473.7	10,433.1	9,427.4	9,211.2	-2.3%
Total spending on retail video	Euro m	9,653.6	9,577.3	9,681.1	9,029.6	8,208.1	8,085.1	-1.5%
Total spending on rental video	Euro m	2,402.2	2,067.4	1,792.6	1,403.5	1,219.3	1,126.1	-7.6%
CONSUMER LEVEL DIGITAL VIDEO*								
Total spending on digital video	Euro m	15.9	28.3	48.6	84.7	138.4	257.0	85.6%
CONSUMER LEVEL TV VOD**								
Total spending on TV VOD	Euro m	434.7	498.2	608.2	678.2	670.7	805.2	20.1%

*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.

**The delivery of movies and TV content on a transactional (VoD/NoVOD/PPV) basis via cable/satellite/IPTV services.

Retail video market

		2005	2006	2007	2008	2009	2010	10/09
Outlets stocking retail video	no	52,270	51,312	50,820	51,570	49,922	42,695	
Retail chains with 10 or more outlets	no	233	228	223	217	206	167	
Kiosks stocking retail video	no	81,360	81,360	81,360	81,360	78,773	76,240	
Revenues from retail DVD								
Revenues from retail DVD	Euro m	6,103.8	6,215.6	6,309.1	5,566.3	4,768.5	4,546.2	-4.7%
Retail DVD shipped to trade	m	676.1	759.5	816.0	800.6	775.1	720.0	-7.1%
Average trade price	Euro	9.03	8.18	7.73	6.95	6.15	6.31	2.6%
Number of titles released								
Trade level: Blu-ray Disc retail								
Revenues from BD	Euro m		0.596	75.8	281.7	464.5	736.9	58.6%
Retail BD shipped to trade	m		0.035	4.3	17.7	35.6	60.3	69.2%
Average trade price	Euro		17.22	17.65	15.95	13.03	12.22	-6.3%
Consumer level: DVD retail								
Spending on retail DVD	Euro m	9,363.6	9,533.0	9,590.7	8,752.0	7,640.8	7,177.9	-6.1%
Retail DVD sold to consumers	m	662.4	713.0	760.3	776.2	745.2	678.2	-9.0%
Average consumer price	Euro	14.14	13.37	12.61	11.28	10.25	10.58	3.2%
Consumer level: Blu-ray Disc retail								
Spending on retail BD			0.146	62.1	258.7	565.9	906.1	60.1%
Retail BD sold to consumers	Euro m		0.005	2.2	10.4	27.9	49.5	77.3%
Average consumer price	Euro		27.61	28.84	24.89	20.28	18.32	-9.7%

Rental video market

		2005	2006	2007	2008	2009	2010	10/09
Video rental outlets	no	34,474	30,617	27,496	24,255	23,165	17,729	
Rental chains with 10 or more outlets	no	136	131	124	122	114	122	
Trade level: DVD rental								
Revenues from rental DVD	Euro m	649.3	539.3	443.3	351.8	267.7	208.7	-22.1%
Rental DVD shipped to trade	m	33.3	29.1	25.5	22.3	19.8	16.5	-16.4%
Average trade price	Euro	19.52	18.51	17.36	15.76	13.53	12.62	-6.8%
Trade level: BD rental								
Revenues from rental BD	Euro m			0.622	3.9	14.0	28.3	102.4%
Rental BD shipped to trade	m			0.029	0.2	1.0	2.1	116.6%
Average trade price	Euro			21.37	17.86	14.64	13.68	-6.5%
Consumer level: DVD rental								
Spending on DVD rental	Euro m	2,279.2	2,047.7	1,789.8	1,393.0	1,187.2	1,061.4	-10.6%
DVD rental transactions	m	716.5	642.8	561.3	466.4	406.3	351.4	-13.5%
Average rental price	Euro	3.18	3.19	3.19	2.99	2.92	3.02	3.4%
Consumer level: BD rental								
Spending on BD rental	Euro m			2.393	10.4	32.1	64.7	101.6%
BD rental transactions	m			0.583	3.4	10.7	21.0	96.9%
Average rental price	Euro			4.10	3.10	3.01	3.08	2.4%

Source: IHS Screen Digest/IVF

Population and household figures: Economist Intelligence Unit

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