France

France: key data

Population	62.9m
TV households	26.3m
DVD Video player/recorder	73.7%
Blu-ray Disc player/recorders penetration	8.7%
Distributor revenues from physical video software	€ 764.5m
Comparison with 2010	-9.7%
DVD/ Blu-ray Disc split	€ 639.2m / € 125.3m
Video software rental/retail split (%)	1 / 99
Consumer spending on physical video software	€ 1.3bn
Comparison with 2010	-9.6%
DVD/ Blu-ray Disc split	€ 1.1bn / € 210.4m
Video software rental/retail split (%)	2 / 98
Consumer spending on digital video and TV VOD	€ 330.2m
Comparison with 2010	24.5%
Digital video/TV VOD split (%)	76 / 24

DVD and Blu-ray Market

After two years of stability, the French DVD and Blu-ray (BD) market declined again in 2011. The turnover decreased by 9.7 per cent.

Units sold to consumers declined by 8.2 per cent compared with the previous year. This decrease was mainly due to a high level of internet piracy and the general economic crisis. In 2011, the offer of popular blockbuster titles was also lacking behind compared with 2010.

Blu-ray represented more than 16 per cent of the turnover in physical video software and almost 9.9 million units (sku's) were sold, compared with 8.1 million units (sku's) in 2010 and 5.3 million units in 2009.

In 2011, feature films were stable, representing 61 per cent of the French DVD and BD market. This is one of the best results in a decade.

The non-film market share on the other hand declined slightly to 36 per cent (3 per cent represented "promotional special non identified sales"). This was the fifth consecutive year in which the non-film market share declined (44 per cent in 2007).

The non-film market still had a 50 per cent share of TV shows. The genre children remained stable at 19 per cent of the total non-film market, whereas the genre music, after a stable year, decreased slightly, taking a share of 13 per cent (20 per cent in 2004). French programs represented about 31 per cent of this non-film market. Documentary represented the smallest share with 5 per cent.

In 2011, French feature films represented 21.5 per cent of the French film video market, a slight increase compared with 2010 (21.3 per cent).

Sales of DVD discs and Blu-ray discs via internet are slowly increasing. Other distribution channels such as entertainment retailers (47 per cent) and hypermarkets (38 per cent) are still very important.

Online distribution

Online video revenues increased in 2011 to EUR 220 million, from EUR 152 million in 2010. 99 per cent of transactions were effected via streaming.

Feature films remained the most popular genre with 67 per cent (64 per cent in 2010), while adult titles represented 26 per cent (down 1 per cent) and TV shows 3.5 per cent of the total turnover.

Internet Protocol Television (IPTV) represented 70 per cent of the turnover, while the remaining 30 percent come from PCs.

Subscription Video on Demand (SVOD) represented 9 per cent of the turnover and around 62.5 million transactions have been effected.

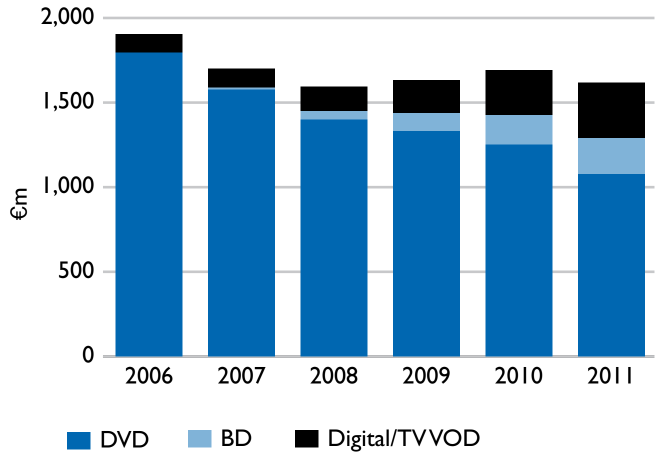
Other relevant developments

Catch-up TV was very successful and 56 per cent of the national TV channel programs were available through catch-up TV. Consumption is growing quickly and the computer is the preferred means for watching catch-up TV (70 per cent).

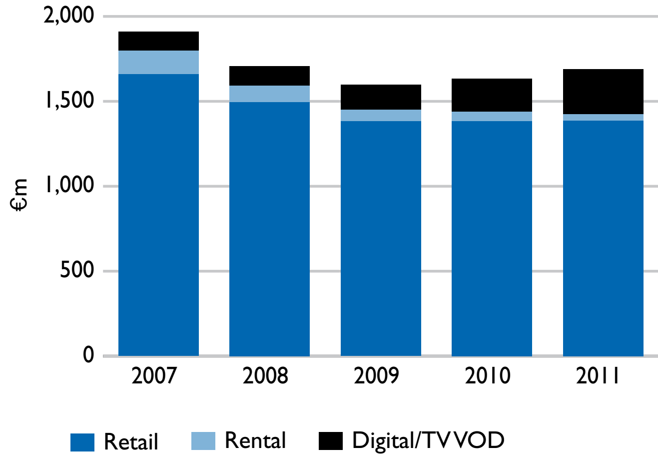
The HADOPI law addressing online infringement has been up and running since October 2010. Piracy remains a relevant topic in France. In spite of the positive actions of HADOPI, it is still too early to evaluate the results. Judicial actions were launched at the end of 2011, the results of which remain to be judged.

This commentary was provided by SEVN, the French Video Association.

Consumer spending by format



Consumer spending by sector



		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	61.4	61.7	62.0	62.3	62.6	62.9	0.4%
Households	m	26.1	26.3	26.5	26.7	26.9	27.1	0.8%
HARDWARE								
TV households	m	25.3	25.5	25.7	25.9	26.1	26.3	0.9%
DVD sector								
DVD Video player/recorder households	m	17.6	18.7	19.5	19.2	19.3	19.4	0.4%
Penetration of TV households	%	69.4	73.4	76.0	74.0	74.0	73.7	
DVD console households	m	5.1	5.1	5.4	5.7	6.3	6.8	7.3%
Penetration of TV households	%	20.0	19.8	20.9	22.2	24.1	25.7	
BD sector								
BD standalone player households	m	0.000	0.009	0.129	0.39	0.97	2.30	136.8%
Penetration of TV households	%	0.001	0.036	0.5	1.5	3.7	8.7	
PS3 console households	m		0.6	1.3	2.1	2.9	3.7	27.2%
Penetration of TV households	%		2.2	4.9	8.0	11.1	13.9	

Total video software market

		2006	2007	2008	2009	2010	2011	10/11
TRADE LEVEL PHYSICAL VIDEO *Total market figures include revenues from legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.*								
Total revenues from video software	Euro m	1,135.3	1,075.2	953.5	880.3	846.9	764.5	-9.7%
Total revenues from retail video	Euro m	1,089.9	1,045.4	934.1	868.3	838.0	759.2	-9.4%
Total revenues from rental video	Euro m	45.4	29.8	19.4	12.0	9.0	5.3	-41.4%

Video market: France

		2006	2007	2008	2009	2010	2011	10/11
CONSUMER LEVEL PHYSICAL VIDEO								
Total market figures include spending on legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.								
Total spending on video software	Euro m	1,798.6	1,593.1	1,450.8	1,439.0	1,425.8	1,288.5	-9.6%
Total spending on retail video	Euro m	1,659.0	1,496.3	1,382.4	1,384.4	1,385.3	1,257.9	-9.2%
Total spending on rental video	Euro m	139.6	96.9	68.4	54.6	40.5	30.6	-24.4%

		2006	2007	2008	2009	2010	2011	10/11
CONSUMER LEVEL DIGITAL VIDEO								
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.								
Total spending on digital video	Euro m	6.1	9.3	13.7	24.8	50.1	79.1	57.8%
CONSUMER LEVEL TV VOD								
The delivery of movies and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services.								
Total spending on TV VOD	Euro m	104.8	104.0	133.4	169.2	215.1	251.1	16.8%

Retail video market

		2006	2007	2008	2009	2010	2011	10/11
Outlets stocking retail video	no.	5,000	5,000	6,500	6,380	5,850	5,320	
Retail chains with 10 or more outlets	no.	30	30	30	30	30	30	
Kiosks stocking retail video	no.	15,000	15,000	15,000	15,000	14,500	14,000	
Trade level: DVD retail								
Revenues from retail DVD	Euro m	1089.2	1029.7	881.3	796.3	729.5	634.2	-13.1%
Retail DVD units shipped to trade	m	98.4	87.8	85.1	89.3	86.8	76.0	-12.4%
Average trade price	Euro	11.07	11.72	10.35	8.92	8.41	8.34	-0.8%
Number of titles released	no.	8,125	7,981	7,000	6,500	5,800	6,000	
Trade level: BD retail								
Revenues from retail BD	Euro m	0.3	10.6	52.0	72.0	108.5	125.0	15.3%
Retail BD units shipped to trade	m	0.02	0.68	3.81	6.2	10.2	10.7	4.5%
Average trade price	Euro	16.58	15.59	13.64	11.62	10.60	11.68	10.2%
Number of titles released	no.	34	390	376	900	850	900	
Consumer level: DVD retail								
Spending on retail DVD	Euro m	1,654.7	1,479.9	1,331.0	1,277.1	1,211.9	1,048.8	-13.5%
Retail DVDs sold to consumers	m	97.4	87.8	85.1	89.3	86.8	76.0	-12.4%
Average consumer price	Euro	16.99	16.85	15.63	14.30	13.97	13.80	-1.2%
Consumer level: BD retail								
Spending on retail BD	Euro m	0.012	9.7	49.6	107.3	173.4	209.1	20.6%
Retail BDs sold to consumers	m	0.000	0.4	2.1	5.3	8.1	9.9	21.6%
Average consumer price	Euro	28.00	26.91	24.18	20.33	21.30	21.12	-0.9%

Rental video market

		2006	2007	2008	2009	2010	2011	10/11
Rental video market data includes both store-based rental and physical rent-by-mail operations where relevant.								
Video rental outlets	no.	2,000	1,900	1,700	1,500	1,400	1,000	
Rental chains with 10 or more outlets	no.	9	9	9	8	7	7	
Trade level: DVD rental								
Revenues from rental DVD	Euro m	45.4	29.7	19.1	11.6	8.2	5.0	-38.9%
Rental DVD units shipped to trade	m	1.6	1.2	0.8	0.5	0.5	0.4	-6.2%
Average trade price	Euro	29.24	25.44	22.62	22.82	17.27	11.25	-34.8%
Number of titles released	no.	675	593	550	500	480	450	
Trade level: BD rental								
Revenues from rental BD	Euro m		0.073	0.273	0.42	0.78	0.25	-67.9%
Rental BD units shipped to trade	m		0.003	0.017	0.04	0.05	0.03	-40.5%
Average trade price	Euro		22.25	15.60	10.30	15.43	8.33	-46.0%
Number of titles released	no.	34	390	376	425	408	383	
Consumer level: DVD rental								
Spending on DVD rental	Euro m	139.6	96.9	68.4	54.4	39.4	29.3	-25.5%
DVD rental transactions	m	46.5	35.0	25.3	20.0	14.7	10.8	-26.7%
Average rental price	Euro	3.00	2.77	2.70	2.72	2.67	2.72	1.6%
Consumer level: BD rental								
Spending on BD rental	Euro m		0.001	0.003	0.16	1.14	1.27	11.3%
BD rental transactions	m		0.001	0.001	0.06	0.43	0.47	9.3%
Average rental price	Euro		2.77	2.70	2.72	2.67	2.72	1.9%

Source: IHS Screen Digest/IVF/SEVN
Population and household figures: IHS Global Insight
Note: Distributor level excludes and consumer level includes VAT/sales tax.

Films by source

	% share
French Films	21.5
American Films	60.5
European Films	11.9
Others	2.4

Source: GfK data published by SEVN/CNC
Notes: 1. Data reflects consumer sales by value.

Retailer volume market shares by channel (all formats)

	% share
Retail Sector	38.1
Supermarket	46.7
Specialist	13.2
Internet	1.7
Other	

Source: GfK data published by SEVN/CNC
Note: 1. Share based on sales volumes

Retail DVD through news kiosks

		2006	2007	2008	2009	2010	2011
DVD consumer sales from kiosks	m	22.9	25.1	24.7	24.0	23.3	20.7
Average DVD kiosk sales price	Euro	10.4	9.6	9.1	8.8	8.6	8.3
Total DVD kiosk consumer spending	Euro m	237.9	240.3	225.9	212.4	199.6	172.8
Kiosks stocking retail video	no.	15,000	15,000	15,000	15,000	15,000	15,000

Source: Screen Digest analysis of available data
1. Kiosk refers to street corner newspaper kiosk or similar specialist retailer which also stocks video product.
2. Sector has historically been dominated by third-party product, therefore the channel is analysed separately from the mainstream business by IHS Screen Digest.
3. Kiosk sales are in addition to the mainstream market

Combined DVD & Blu-ray Disc retail top 10

Rank	Title
1	Star Wars
2	Harry Potter et les Reliques de la Mort: Partie 2
3	Inception
4	Pirates des Caraïbes: La Fontaine de Jouvence
5	Harry Potter et les Reliques de la Mort: Partie 1
6	Transformers 3: La face Cachée de la Lune
7	Avatar
8	La Planète des Singes: Les Origines
9	X-Men: Le Commencement
10	Le Roi Lion

Source: Syndicat de l'Edition Vidéo Numerique (SEVN)
1. Ranking based on retail sales by volume
2. Units sold based on available data