

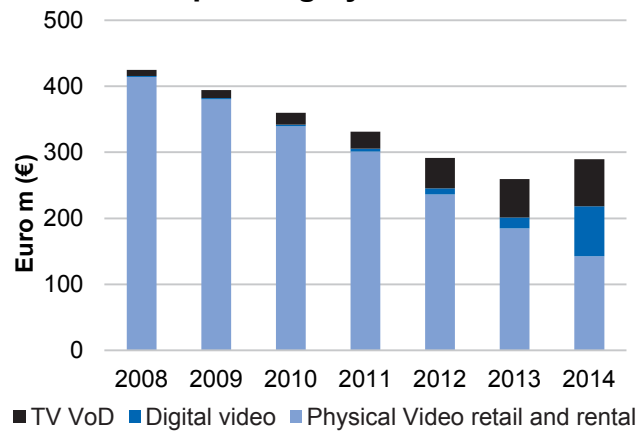
Netherlands

Netherlands key data

| | |
|--|----------|
| Population | 17m |
| TV households | 7.5m |
| Consumer spending on physical video software | € 142.8m |
| Comparison with 2013 | -22.7% |
| Consumer spending on digital video and TVVoD | € 146.5m |
| Comparison with 2013 | 95.7% |



Consumer spending by sector



Video market: Netherlands

Video market: Netherlands

| | | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 13/14 |
|---|---|------|------|------|------|------|------|------|-------|
| General | | | | | | | | | |
| Population | m | 16.8 | 16.9 | 16.9 | 17.0 | 17.0 | 17.0 | 17.0 | 0.1% |
| TV households | m | 7.1 | 7.2 | 7.2 | 7.3 | 7.4 | 7.5 | 7.5 | 0.6% |
| DVD Video player/recorder | % | 86.7 | 86.1 | 85.8 | 86.0 | 77.7 | 84.9 | 82.4 | -3.0% |
| Blu-ray Disc player/recorders penetration | % | 0.5 | 2.0 | 4.6 | 7.4 | 9.9 | 15.9 | 22.1 | 38.8% |

Total video software market

| | | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 13/14 |
|--|--------|-------|-------|-------|-------|-------|-------|-------|-------|
| CONSUMER LEVEL ALL VIDEO | | | | | | | | | |
| <i>Total market figures include consumption of both physical and digital video</i> | | | | | | | | | |
| Total spending on video | Euro m | 424.5 | 394.4 | 359.5 | 331.0 | 291.2 | 259.6 | 289.3 | 11.4% |

| | | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 13/14 |
|---|--------|-------|-------|-------|-------|-------|-------|-------|--------|
| CONSUMER LEVEL PHYSICAL VIDEO | | | | | | | | | |
| <i>Total market figures include consumption of legacy formats not broken out separately (eg,VHS, HD-DVD, UMD) where relevant.</i> | | | | | | | | | |
| Total spending on physical video software | Euro m | 414.2 | 380.2 | 339.4 | 301.2 | 236.3 | 184.7 | 142.8 | -22.7% |
| Total spending on physical video retail | Euro m | 371.4 | 342.5 | 309.6 | 282.0 | 224.5 | 175.9 | 135.3 | -23.1% |

| | | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 13/14 |
|--|--------|------|------|------|------|------|------|------|--------|
| 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. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data. This data is typified by major international players such as iTunes and Netflix.</i> | | | | | | | | | |
| Total spending on digital video | Euro m | 1.4 | 1.8 | 2.5 | 4.1 | 9.2 | 16.7 | 75.6 | 352.3% |

| | | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 13/14 |
|---|--------|------|------|------|------|------|------|------|-------|
| CONSUMER LEVEL TV VOD | | | | | | | | | |
| <i>The delivery of movies and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.</i> | | | | | | | | | |
| Total spending on TV VOD | Euro m | 8.9 | 12.4 | 17.6 | 25.7 | 45.6 | 58.1 | 70.9 | 21.9% |

Note 1: Consumer level digital video and TV VOD figures may differ from locally published figures due to the application of different definitions.

Note 2: Historical numbers in this section may differ from those published in previous years owing to changes in IHS methodology.

Source: IHS