

Netherlands

Netherlands: key data

Population	16.8m
TV households	7.3m
DVD Video player/recorder penetration	84.9%
Blu-ray Disc player/recorders penetration	15.9%
Consumer spending on physical video software	€ 181.3m
Comparison with 2012	-23.3%
DVD/ Blu-ray Disc split	€ 151.8m / € 29.5m
Video software rental/retail split (%)	5 / 95
Consumer spending on digital video and TV VOD	€ 72.2m
Comparison with 2012	35.8%
TVVOD/ Digital video split (%)	79 / 21



DVD, Blu-ray and online markets

Overall consumer spending on film and television series on physical carriers decreased by 23,3 per cent in units. 5,1 million fewer products were sold in 2013 compared to 2012. The total turnover of DVD decreased by 23.5 per cent and Blu-ray (BD) by 21,7 per cent. Sales of DVD and BD were at an all-time low of EUR 172,4 million. The average price of DVD and BD decreased slightly to EUR 10 for a DVD and EUR 16 for a BD.

After television providers such as Ziggo, KPN and UPC paved the way for video on demand (VoD), further growth in the online segment was created with the arrival of Netflix in the Netherlands. In 2013, an increase of 23 per cent in VoD/online turnover led to a total of EUR 88,5 million. However, the total video market decreased by 12,4 per cent.

Surprisingly, in 2013 the best-selling title on DVD/BD was the same as in 2012: the French film “Les Intouchables”. In the top three for both DVD and BD were “James Bond - Skyfall” and “The Hobbit - An Unexpected Journey”. Five Dutch titles are in the top five of best-selling physical products.

Other relevant developments

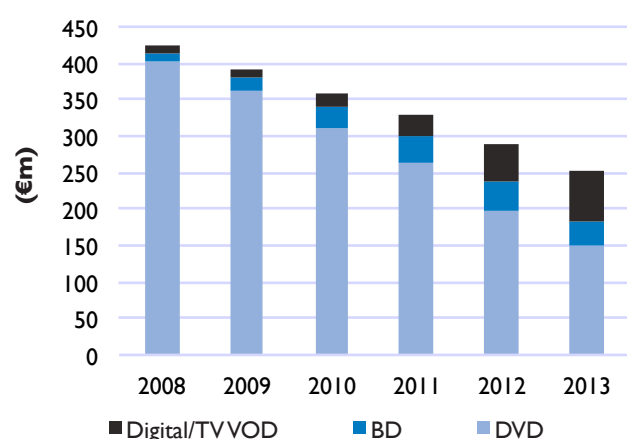
In the Netherlands, the number of cinema visitors rose to 30.8 million, an increase of 0.8 per cent compared to the previous year. The most popular film was “Despicable Me 2”.

The Dutch anti-piracy organization BREIN took 510 illegal sites off line. One site was blocked by access providers, The Pirate Bay – the appeal of this decision is still pending – and BREIN has removed 206 proxies. After notifications by BREIN, Google removed over 2.3 million search results for illegal files. In total, 780 investigations were performed of which 708 concerned online offer of infringing files.

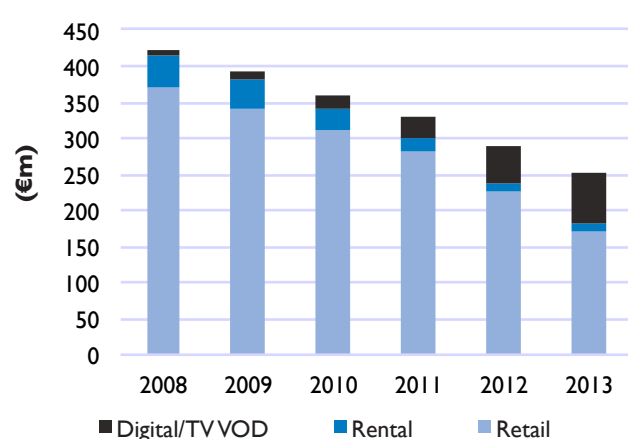
The Dutch government continues its reflections on modernizing copyright. There have been discussions about the introduction of a fair use exception. In general, the opinion is that this would not be desirable; flexibility in the exercise of copyright within the framework of the three step test is seen as the preferred option. The opinion of the European Court of Justice in the ACI/ThuisKopie case means that downloading from illegal sources can no longer be considered legitimate private copies. This decision followed long discussions in the Dutch Parliament. The discussion has now shifted towards whether or not to target end-users in activities addressing illegal content. This is not the intention of right holders who do, however, expect some support from the government in blocking access to illegal sites.

This commentary was provided by NVPI, the Dutch Video Association.

Consumer spending by format



Consumer spending by sector



Source: IHS/IVF/NVPI

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		2008	2009	2010	2011	2012	2013	12/13
EXCHANGE RATES								
Exchange rate: \$1 =	Euro	0.68	0.72	0.75	0.72	0.78	0.75	
GENERAL								
Population	m	16.5	16.6	16.7	16.7	16.8	16.8	0.3%
Households	m	5.2	5.3	5.3	5.3	5.4	5.4	0.6%
HARDWARE								
TV households	m	7.2	7.2	7.2	7.3	7.3	7.3	0.4%
DVD sector								
DVD Video player/recorder households	m	6.2	6.2	6.2	6.3	5.7	6.2	9.8%
Penetration of TV households	%	86.7	86.1	85.8	86.0	77.7	84.9	9.3%
DVD console households	m	1.3	1.4	1.4	1.5	1.5	1.3	-11.9%
Penetration of TV households	%	18.4	19.1	19.8	20.7	20.3	17.8	-12.3%
BD sector								
BD standalone player households	m	0.03	0.15	0.33	0.54	0.72	1.17	61.8%
Penetration of TV households	%	0.5	2.0	4.6	7.4	9.9	15.9	61.1%
PS3 console households	m	0.3	0.4	0.6	0.8	0.9	1.1	19.9%
Penetration of TV households	%	3.5	5.8	8.1	10.7	12.9	15.4	19.4%

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	423.6	393.1	358.0	329.3	289.5	253.5	-12.4%
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	414.2	380.2	339.4	301.2	236.3	181.3	-23.3%
Total spending on retail video	Euro m	371.4	342.5	309.6	282.0	224.5	172.4	-23.2%
Total spending on rental video	Euro m	42.8	37.7	29.8	19.2	11.8	8.9	-25.1%

Video market: Netherlands

		2008	2009	2010	2011	2012	2013	12/13
<i>Owing to a definitional change, digital video and TVVOD numbers may differ from those published in the 2012 IVF Yearbook.</i>								
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	1.4	1.8	2.5	4.1	9.0	15.3	70.9%
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	8.0	11.1	16.0	24.0	44.2	56.8	28.6%

Retail video market

		2008	2009	2010	2011	2012	2013	12/13
Outlets stocking retail video	no.	3,000	2,900	2,800	2,100	1,750		
Retail chains with 10 or more outlets	no.	9	9	8	6	5		
Kiosks stocking retail video	no.							
Consumer level: DVD retail								
Spending on retail DVD	Euro m	361.7	323.5	280.9	245.8	187.6	143.6	-23.5%
Retail DVDs sold to consumers	m	34.8	31.0	26.2	24.9	18.0	13.6	-24.4%
Average consumer price	Euro	10.41	10.45	10.74	9.87	10.40	10.53	1.2%
Consumer level: BD retail								
Spending on retail BD	Euro m	9.6	19.0	28.7	36.2	36.9	28.9	-21.7%
Retail BDs sold to consumers	m	0.4	0.9	1.5	2.3	2.4	1.9	-21.9%
Average consumer price	Euro	26.00	22.10	18.86	15.42	15.57	15.61	0.3%

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.	700	600	510	340	260		
Rental chains with 10 or more outlets	no.	14	12	10	7			
Consumer level: DVD rental								
Spending on DVD rental	Euro m	42.8	37.1	28.5	18.1	11.1	8.3	-25.3%
DVD rental transactions	m	13.0	11.2	8.4	5.5	3.3	2.4	-26.5%
Average rental price	Euro	3.30	3.31	3.38	3.31	3.36	3.42	1.6%
Consumer level: BD rental								
Spending on BD rental	Euro m	0.04	0.58	1.39	1.08	0.75	0.59	-21.3%
BD rental transactions	m	0.01	0.17	0.41	0.33	0.22	0.17	-21.5%
Average rental price	Euro	3.30	3.31	3.38	3.31	3.37	3.38	0.3%

Source: IHS/IVF/NVPI

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.

Top 10 retail DVD titles

Rank	Title	Studio
1	Intouchables	Filmfreak
2	James Bond 007: Skyfall	MGM Home Entertainment
3	Hobbit: An Unexpected Journey	Warner Home Video
4	Alles Is Familie	A-Film
5	Mees Kees	E-One Entertainment
6	Despicable Me	Universal Studios
7	Despicable Me 2	Universal Studios
8	Twilight Saga: Breaking Dawn Part 2	BELGA HV
9	Sinterklaas & De Verdwenen Pakjesboot	E-One Entertainment
10	Ted	Universal Studios

Source: GfK/NVPI

Notes: 1. Titles ranked by unit sales

Top 10 retail Blu-ray Disc titles

Rank	Title	Studio
1	Hobbit: An Unexpected Journey	Warner Home Video
2	James Bond 007: Skyfall	MGM Home Entertainment
3	Django Unchained	Sony Pictures Home Entertainment
4	Avatar	Twentieth Century Fox
5	Game of Thrones 2	Warner Home Video
6	Life of Pi	Twentieth Century Fox
7	Iron Man 3	Walt Disney Studios Home entertainment
8	Fast & The Furious 6	Universal Pictures
9	Star Trek: Into Darkness	Paramount Home Entertainment
10	Despicable Me 2	Universal Studios

Source: GfK/NVPI

Notes: 1. Titles ranked by unit sales