

Netherlands

Netherlands: key data

Population	16.6m
TV households	7.2m
DVD households (penetration)	86.2%
Blu-ray Disc household (penetration)	4.6%
Distributor revenues from physical video software	€ 219.9m
Comparison with 2009	-13.3%
DVD/Blu-ray Disc split	€ 201.2m / € 18.6m
Video software rental/retail split	3/97
Consumer spending on physical video software	€ 339m
Comparison with 2009	-10.6%
DVD/Blu-ray Disc split	€ 308.9m / € 30m
Video software rental/retail split	9/91

DVD and Blu-ray market

In 2010, Dutch consumer spending decreased by 10 per cent. The total number of DVDs sold declined by 15.6 per cent to 26.2 million units. The number of Blu-ray Discs (BD) sold went up by 77 per cent to 1.5 million units. Blu-ray accounted for 10 per cent of the total turnover.

Despite the fact that Blu-ray Disc prices dropped to a level closer to that of a DVD disc, the Blu-ray format still did not achieve the expected mass-market acceptance. Blu-ray accounted for a 10 per cent share of the total DVD and BD market. However, consumers preferred to buy new release titles on the Blu-ray format. New release titles on Blu-ray took a share of 20 per cent, even reaching 30 per cent in certain periods. Back catalogue titles and TV shows released on the Blu-ray format experienced less success.

Next to the success of international titles such as "Avatar", "This is It", "Life" and "Alice in Wonderland", Dutch productions such as "De Storm", "Oorlogswinter" and "Komt een Vrouw bij de Dokter" were very successful.

Online distribution

Online distribution services (streaming and EST) have become more popular. There are about twenty on-demand services available to consumers in the Netherlands. Research conducted by TNO and initiated by NVPI



illustrate that there is still a lot of potential for video-on-demand services. 54 per cent of the consumers surveyed were aware of the availability, but only 6 per cent took advantage of these services in the last year. Still, in 2010, the total turnover was estimated at EUR 27 million compared to EUR 22 million in 2009. A consumer campaign is planned to be organised in 2011 to increase the use of online distribution services.

Other relevant developments

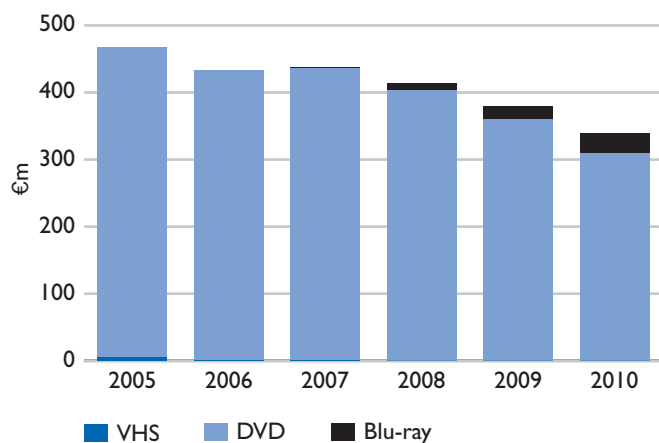
In 2010, the Dutch anti-piracy organisation BREIN closed more than 600 illegal sites and internet services. These were mainly p2p sites (bittorent), but also usenet sites as well as streaming and linksites using cyberlockers. With Dutch cyberlockers over 45,000 unauthorised files were taken down. Approximately 100,000 advertisements offering illegal copies of books, films, TV series, games and music were deleted from auction sites.

The Dutch government has announced that it will propose a change to the current copyright regime, by introducing a ban on downloading from illegal sources (which is currently considered legal in the Netherlands) together with a site blocking regime.

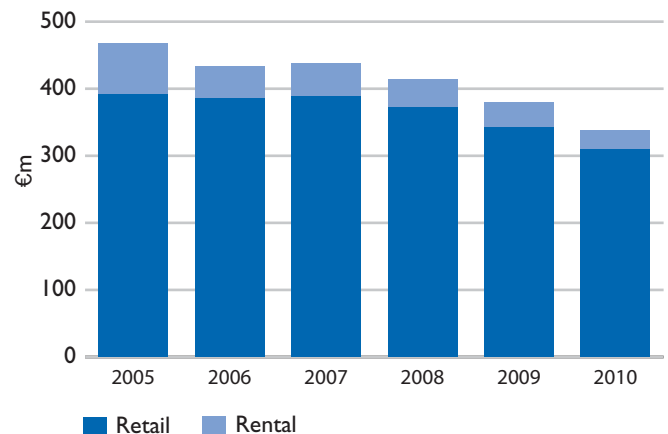
This commentary was provided by NVPI, the Dutch Video Association.

Video market: Netherlands

Consumer spending by format



Consumer spending by sector



		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	16.31	16.33	16.36	16.41	16.49	16.58	0.5%
Households	m	7.11	7.16	7.20	7.24	7.28	7.31	0.5%
HARDWARE								
TV households	m	6.9	7.0	7.1	7.1	7.2	7.2	0.4%
DVD sector								
DVD Video player/recorder households	m	4.9	5.7	6.1	6.2	6.2	6.2	0.2%
Penetration of TV households	%	70.0	81.3	86.3	87.4	86.5	86.2	
DVD console households	m	1.0	1.1	1.2	1.3	1.4	1.4	3.9%
Penetration of TV households	%	14.8	16.1	17.2	18.5	19.1	19.8	
BD sector								
BD standalone player households	m			0.002	0.035	0.1	0.3	124.5%
Penetration of TV households	%			0.021	0.487	2.0	4.6	
PS3 console households	m			0.107	0.252	0.4	0.6	40.1%
Penetration of TV households	%			1.519	3.547	5.8	8.1	

Total video software market

		2005	2006	2007	2008	2009	2010	10/09
TRADE LEVEL PHYSICAL VIDEO								
Total revenues from video software	Euro m	270.9	265.1	280.4	276.8	253.5	219.9	-13.3%
Total revenues from retail video	Euro m	247.3	246.0	265.9	263.6	242.9	213.9	-11.9%
Total revenues from rental video	Euro m	23.6	19.1	14.5	13.2	10.6	6.0	-43.5%
CONSUMER LEVEL PHYSICAL VIDEO								
Total spending on video software	Euro m	467.3	433.0	437.8	413.6	379.4	339.0	-10.6%
Total spending on retail video	Euro m	392.1	385.7	388.1	371.4	342.5	309.6	-9.6%
Total spending on rental video	Euro m	75.2	47.3	49.7	42.3	36.9	29.4	-20.3%

Consumer level physical video

		2005	2006	2007	2008	2009	2010	10/09
CONSUMER LEVEL DIGITAL VIDEO*								
Total spending on digital video	Euro m	0.0	0.2	0.7	1.2	1.5	1.9	27.6%
CONSUMER LEVEL TVVOD**								
Total spending on TVVOD	Euro m	1.0	4.6	9.6	12.3	15.3	21.7	42.1%

*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/INVoD/PPV) basis via cable/satellite/IPTV services.

Retail video market

		2005	2006	2007	2008	2009	2010	10/09
Outlets stocking retail video	no	3,000	3,000	3,000	3,000	2,900	2,800	
Retail chains with 10 or more outlets	no	9	9	9	9	9	8	
Kiosks stocking retail video	no							
Trade level: DVD retail								
Revenues from retail DVD	Euro m	245.2	245.3	261.9	253.8	225.4	195.6	-13.2%
Retail DVD shipped to trade	m	30.5	35.3	35.3	34.1	31.4	26.5	-15.6%
Average trade price	Euro	8.04	6.95	7.42	7.44	7.18	7.38	2.8%
Number of titles released	no	4,000	4,250	4,250	4,290	4,260	4,200	-1.4%
Trade level: Blu-ray Disc retail								
Revenues from retail BD	Euro m		0.0	3.2	9.8	17.5	18.2	4.3%
Retail BD shipped to trade	m		0.0	0.2	0.7	1.3	1.6	22.2%
Average trade price	Euro		19.00	16.24	13.81	13.48	11.50	-14.7%
Consumer level: DVD retail								
Spending on retail DVD	Euro m	388.6	385.0	385.7	361.7	323.5	280.9	-13.2%
Retail DVD sold to consumers	m	30.5	33.6	35.2	34.8	31.0	26.2	-15.6%
Average consumer price	Euro	12.75	11.46	10.96	10.41	10.45	10.74	2.8%
Consumer level: Blu-ray Disc retail								
Spending on retail BD	Euro m			1.800	9.620	19.0	28.7	50.8%
Retail BD sold to consumers	m			0.060	0.370	0.9	1.5	76.7%
Average consumer price	Euro			30.00	26.00	22.10	18.86	-14.7%

Rental video market

		2005	2006	2007	2008	2009	2010	10/09
Video rental outlets	no	1,000	900	800	700	600	510	
Rental chains with 10 or more outlets	no	15	15	14	14	12	10	
Trade level: DVD rental								
Revenues from rental DVD	Euro m	23.0	19.1	14.5	13.1	10.2	5.6	-45.3%
Rental DVD shipped to trade	m	1.4	1.2	1.1	1.1	0.9	0.4	-53.8%
Average trade price	Euro	16.43	15.95	13.17	12.09	11.00	13.02	18.4%
Number of titles released	no	700	750	750	750	730	690	-5.5%
Trade level: BD rental								
Revenues from rental BD	Euro m				0.105	0.337	0.376	11.8%
Rental BD shipped to trade	m				0.008	0.025	0.028	13.6%
Average trade price	Euro				12.83	13.72	13.50	-1.6%
Number of titles released	no				388	621	587	-5.5%
Consumer level: DVD rental								
Spending on DVD rental	Euro m	72.8	47.0	49.7	42.2	36.3	28.0	-22.8%
DVD rental transactions	m	22.4	14.3	15.4	13.0	11.2	8.4	-24.9%
Average rental price	Euro	3.25	3.28	3.23	3.26	3.24	3.33	2.8%
Consumer level: BD rental								
Spending on BD rental	Euro m				0.039	0.564	1.368	142.5%
BD rental transactions	m				0.012	0.174	0.412	136.6%
Average rental price	Euro				3.26	3.24	3.32	2.5%

Source: IHS Screen Digest/IVF

Population and household figures: Economist Intelligence Unit

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

Video market: Netherlands

DVD retail top 10

rank	title	distributor
1	Komt Een Vrouw Bij De Dokter	Video Film Express
2	Inglourious Basters	Universal Pictures
3	Avatar	Twentieth Century Fox
4	Michael Jackson's This Is It	Sony Pictures
5	Storm	Universal Pictures
6	Mamma Mia The Movie	Universal Pictures
7	Oorlogswinter	Video Film Express
8	2012	Sony Pictures
9	Alice in Wonderland 2010	Walt Disney
10	Toy Story 3	Walt Disney

Source: Dutch Video Association (NVPI)

Notes: 1. Ranking based on retail sales by volume

Blu-ray Disc retail top 10

rank	title	distributor
1	Avatar	Twentieth Century Fox
2	2012	Sony Pictures
3	Life	Just Brodge
4	Alice in Wonderland 2010	Walt Disney
5	Inglourious Basters	Universal Pictures
6	Komt Een Vrouw Bij De Dokter	Video Film Express
7	Sherlock Holmes 2010	Warner Bros.
8	Prince of Persia/The Sands of Time	Walt Disney
9	Inception	Warner Bros.
10	Michael Jackson's This Is It	Sony Pictures

Source: Dutch Video Association (NVPI)

Notes: 1. Ranking based on retail sales by volume