Netherlands

Netherlands: key data

Population	16.7m
TV households	7.3m
DVD Video player/recorder	86.0%
Blu-ray Disc player/recorders penetration	7.4%
Distributor revenues from physical video software	€ 194.7m
Comparison with 2010	-11.4%
DVD/ Blu-ray Disc split	€ 169.9m /€ 24.9m
Video software rental/retail split (%)	2 / 98
Consumer spending on physical video software	€ 301m
Comparison with 2010	-11.2%
DVD/ Blu-ray Disc split	€ 263.7m / € 37.2m
Video software rental/retail split (%)	6 / 94
Consumer spending on digital video and TV VOD	€ 35m
Comparison with 2010	50%
Digital video/TV VOD split (%)	83 / 17

DVD and Blu-ray market

Overall consumer spending on films and television series on physical carriers decreased by more than 8 per cent in 2011. Despite the fact that the turnover of Blu-ray grew by 26 per cent, it was not enough to compensate for the decrease of DVD sales.

The decrease in turnover was mainly due to lower average prices of new releases (top-10 excepted) and a better backlist of titles within the DVD market. The average price of these titles dropped by EUR 3, more than the average decrease of EUR 1. The price of Blu-ray decreased significantly: In 2010, the average price was EUR 19 and in 2011, it dropped to EUR 15.40. The number of units sold declined slightly by 1 per cent (300,000 units).

With two Harry Potter movies and a number of fast selling Dutch movies such as 'Gooische Vrouwen' and 'New Kids Turbo', the top-10 of retail DVDs showed a significant increase in turnover of 15 per cent.

Online distribution

The market for online distribution services is developing very fast. The turnover of on-demand services grew by 51.4 per cent to 53 million euro. Adding the turnover of online distribution services to the physical market, the total consumer spending on audiovisual home entertainment only decreased by 1.6 per cent. It is widely expected that online distribution will grow further in 2012 with the launch of new services, such as Pathé Thuis and the installed base of connected TVs.

Other relevant developments

2011 was a very successful year for Dutch cinemas. Over 30 million tickets were sold, the highest number since 1978. This is mainly due to the success of Dutch movies (such as 'Gooische Vrouwen'), the introduction of 3D films and the increasing number of cinema screens and also bigger screening rooms that can hold many more visitors. Over the last 5 years, around 13.000 additional seats and 96 screening rooms have been added.

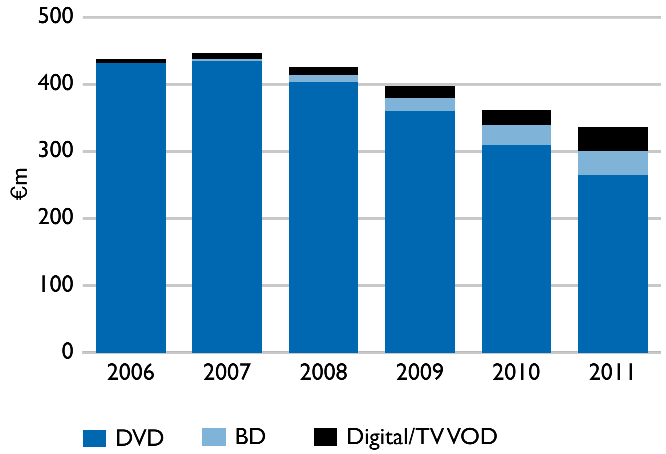
The Dutch content protection organization BREIN, closed 594 illegal sites and internet services. These were mainly bittorent sites (383), but also link sites using cyberlockers, streaming sites, usenet sites and top sites of release groups. In the beginning of 2012, a Dutch Court ordered the blocking of access from the Netherlands to The Pirate Bay website.

In the meantime, the Dutch government has discussed the future of the current copyright regime with the Parliament. Initially, a ban on downloading from illegal sources (which is currently considered legal in the Netherlands) together with a site blocking regime was under consideration. There had been some disagreements on this issue and the Government will come back to the Parliament for further discussions in 2012.

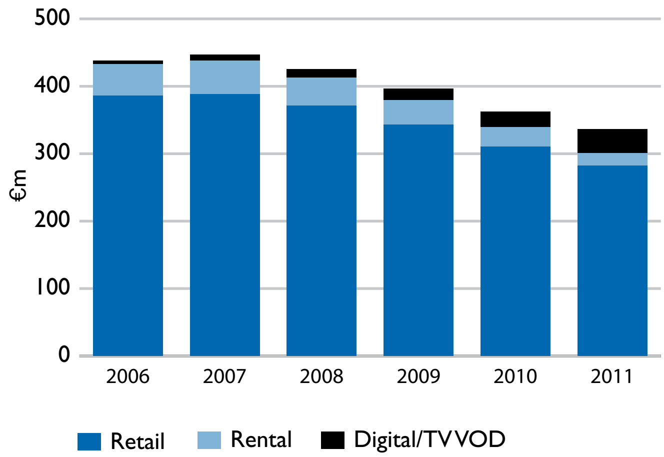
This commentary was provided by NVPI, the Dutch Video Association.

Video market: Netherlands

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	16.4	16.5	16.5	16.6	16.7	16.7	0.3%
Households	m	5.1	5.2	5.2	5.3	5.3	5.3	0.6%
HARDWARE								
TV households	m	7.1	7.1	7.2	7.2	7.2	7.3	0.4%
DVD sector								
DVD Video player/recorder households	m	5.7	6.1	6.2	6.2	6.2	6.3	0.6%
Penetration of TV households	%	80.7	85.8	86.7	86.1	85.8	86.0	
DVD console households	m	1.1	1.2	1.3	1.4	1.4	1.5	4.7%
Penetration of TV households	%	15.9	17.0	18.4	19.1	19.8	20.7	
BD sector								
BD standalone player households	m		0.002	0.035	0.15	0.33	0.54	62.7%
Penetration of TV households	%		0.021	0.5	2.0	4.6	7.4	
PS3 console households	m		0.1	0.3	0.4	0.6	0.7	28.1%
Penetration of TV households	%		1.5	3.5	5.8	8.1	10.3	

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	265.1	280.4	276.8	253.5	219.9	194.7	-11.4%
Total revenues from retail video	Euro m	246.0	265.9	263.6	242.9	213.9	191.3	-10.6%
Total revenues from rental video	Euro m	19.1	14.5	13.2	10.6	6.0	3.5	-42.1%

Video market: Netherlands

		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	433.0	437.8	413.6	379.4	339.0	301.0	-11.2%
Total spending on retail video	Euro m	385.7	388.1	371.4	342.5	309.6	282.0	-8.9%
Total spending on rental video	Euro m	47.3	49.7	42.3	36.9	29.4	19.0	-35.4%

		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	0.2	0.7	1.2	1.5	1.9	6.0	219.8%
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	5.2	8.4	11.0	15.1	21.5	29.0	35.1%

Retail video market

		2006	2007	2008	2009	2010	2011	10/11
Outlets stocking retail video	no.	3,000	3,000	3,000	2,900	2,800	2,100	
Retail chains with 10 or more outlets	no.	9	9	9	9	8	6	
Kiosks stocking retail video	no.							
Trade level: DVD retail								
Revenues from retail DVD	Euro m	245.3	261.9	253.8	225.4	195.6	167.0	-14.6%
Retail DVD units shipped to trade	m	35.3	35.3	34.1	31.4	26.5	21.3	-19.8%
Average trade price	Euro	6.95	7.42	7.44	7.18	7.38	7.85	6.4%
Number of titles released	no.	4,250	4,250	4,290	3,732	3,174	2,611	
Trade level: BD retail								
Revenues from retail BD	Euro m	0.005	3.2	9.8	17.5	18.2	24.3	33.0%
Retail BD units shipped to trade	m	0.000	0.20	0.71	1.3	1.6	2.2	41.0%
Average trade price	Euro	19.00	16.24	13.81	13.48	11.50	10.85	-5.6%
Number of titles released	no.		31	408	388	429	470	
Consumer level: DVD retail								
Spending on retail DVD	Euro m	385.0	385.7	361.7	323.5	280.9	245.8	-12.5%
Retail DVDs sold to consumers	m	33.6	35.2	34.8	31.0	26.2	24.9	-4.8%
Average consumer price	Euro	11.46	10.96	10.41	10.45	10.74	9.87	-8.1%
Consumer level: BD retail								
Spending on retail BD	Euro m		1.8	9.6	19.0	28.7	36.2	26.1%
Retail BDs sold to consumers	m		0.1	0.4	0.9	1.5	2.3	54.3%
Average consumer price	Euro		30.00	26.00	22.10	18.86	15.42	-18.2%

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.	900	800	700	600	510	340	
Rental chains with 10 or more outlets	no.	15	14	14	12	10	7	
Trade level: DVD rental								
Revenues from rental DVD	Euro m	19.1	14.5	13.1	10.2	5.6	2.9	-49.1%
Rental DVD units shipped to trade	m	1.2	1.1	1.1	0.9	0.4	0.2	-60.5%
Average trade price	Euro	15.95	13.17	12.09	11.00	13.02	16.76	28.7%
Number of titles released	no.	750	750	750	730	690	600	
Trade level: BD rental								
Revenues from rental BD	Euro m			0.105	0.34	0.38	0.61	62.4%
Rental BD units shipped to trade	m			0.008	0.02	0.03	0.03	22.5%
Average trade price	Euro			12.83	13.72	13.50	17.90	32.6%
Number of titles released	no.			388	429	470	510	
Consumer level: DVD rental								
Spending on DVD rental	Euro m	47.0	49.7	42.2	36.3	28.0	17.9	-36.1%
DVD rental transactions	m	14.3	15.4	13.0	11.2	8.4	5.5	-35.0%
Average rental price	Euro	3.28	3.23	3.26	3.24	3.33	3.27	-1.7%
Consumer level: BD rental								
Spending on BD rental	Euro m			0.04	0.56	1.37	1.07	-21.6%
BD rental transactions	m			0.01	0.17	0.41	0.33	-20.5%
Average rental price	Euro			3.26	3.24	3.32	3.27	-1.4%

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

DVD retail top 10

Rank	Title	Distributor
1	Harry Potter and the Deathly Hallows: Part 1	Warner Bros.
2	Gooische Vrouwen	Video Film Express
3	Harry Potter and the Deathly Hallows: Part 2	Warner Bros.
4	Haar Naam Was Sarah	Video Film Express
5	Eat Pray Love	Sony Pictures
6	New Kids Turbo	Video Film Express
7	Sonny Boy	A-Film
8	Rapunzel	Walt Disney
9	Cars 2	Walt Disney
10	Inception	Warner Bros.

Source: Dutch Video Association (NVPI)
Notes: 1. Ranking based on retail sales by volume
2. Units sold based on available data

Blu-ray Disc retail top 10

Rank	Title	Distributor
1	Harry Potter and the Deathly Hallows: Part 1	Warner Bros.
2	Harry Potter and the Deathly Hallows: Part 2	Warner Bros.
3	New Kids Turbo	Video Film Express
4	Inception	Warner Bros.
5	Lord of the Rings Trilogy	A-Film
6	Rapunzel	Walt Disney
7	Pirates of the Caribbean: On Stranger Tides	Walt Disney
8	Transformers: Dark Side of the Moon	Paramount Pictures
9	Cars 2	Walt Disney
10	Life	Just Bridge

Source: Dutch Video Association (NVPI)
Notes: 1. Ranking based on retail sales by volume
2. Units sold based on available data