

Portugal

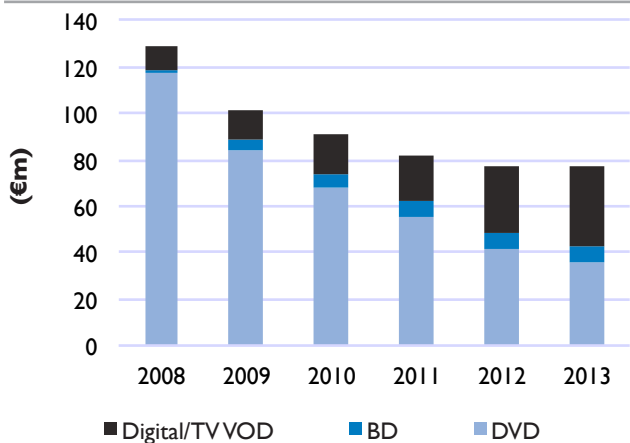
Portugal: key data

Population	10.8m
TV households	3.9m
DVD Video player/recorder penetration	82.5%
Blu-ray Disc player/recorders penetration	15.2%
Consumer spending on physical video software	€ 43m
Comparison with 2012	-11.7%
DVD/ Blu-ray Disc split	€ 35.5m / € 7.5m
Video software rental/retail split (%)	27 / 73
Consumer spending on digital video and TV VOD	€ 34.1m
Comparison with 2012	19.8%
TVVOD/ Digital video split (%)	82 / 18



Video market: Portugal

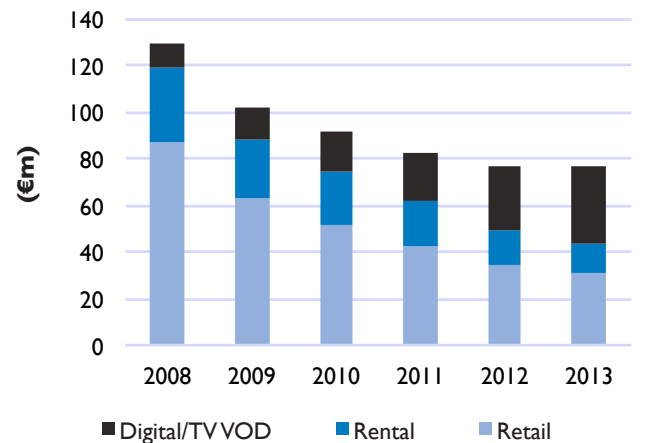
Consumer spending by format



Source: IHS/IVF

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Consumer spending by sector



Source: IHS/IVF

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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	10.7	10.7	10.7	10.8	10.8	10.8	0.1%
Households	m	4.0	4.0	4.0	4.0	4.0	4.1	0.5%
HARDWARE								
TV households	m	3.7	3.8	3.8	3.8	3.8	3.9	0.7%
DVD sector								
DVD Video player/recorder households	m	3.1	3.2	3.3	3.3	3.2	3.2	-1.4%
Penetration of TV households	%	84.0	85.4	86.5	85.3	84.3	82.5	-2.1%
DVD console households	m	0.6	0.6	0.5	0.5	0.5	0.4	-13.2%
Penetration of TV households	%	15.4	14.9	14.4	13.7	12.3	10.6	-13.8%
BD sector								
BD standalone player households	m	0.01	0.06	0.12	0.23	0.38	0.59	56.1%
Penetration of TV households	%	0.2	1.5	3.2	5.9	9.8	15.2	55.0%
PS3 console households	m	0.11	0.18	0.24	0.30	0.36	0.42	16.3%
Penetration of TV households	%	2.9	4.7	6.3	7.9	9.4	10.8	15.4%

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	129.1	101.7	91.5	82.4	77.1	77.0	-0.1%
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	119.0	88.4	74.2	62.0	48.7	43.0	-11.7%
Total spending on retail video	Euro m	86.9	63.2	51.9	42.5	34.1	31.3	-8.3%
Total spending on rental video	Euro m	32.1	25.2	22.3	19.4	14.6	11.7	-19.7%

Video market: Portugal

		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	0.003	0.008	0.010	0.449	3.86	6.19	60.3%
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	10.0	13.4	17.2	20.0	24.6	27.9	13.4%

Retail video market

		2008	2009	2010	2011	2012	2013	12/13
Outlets stocking retail video	no.	500	500	450	410	390		
Retail chains with 10 or more outlets	no.	7	6	6	4	4		
Kiosks stocking retail video	no.	4,500	4,500	4,400	4,000	3,760		
Consumer level: DVD retail								
Spending on retail DVD	Euro m	84.9	58.8	46.1	36.6	28.5	25.3	-11.4%
Retail DVDs sold to consumers	m	7.3	6.0	5.0	4.1	3.2	2.9	-10.0%
Average consumer price	Euro	11.65	9.73	9.24	9.01	8.88	8.74	-1.5%
Consumer level: BD retail								
Spending on retail BD	Euro m	2.0	4.3	5.8	5.9	5.6	6.0	7.3%
Retail BDs sold to consumers	m	0.1	0.2	0.3	0.3	0.3	0.4	9.5%
Average consumer price	Euro	25.99	23.52	21.02	17.71	16.42	16.09	-2.0%

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.	600	580	540	490	460	100	
Rental chains with 10 or more outlets	no.	7	6	5	5	5		
Consumer level: DVD rental								
Spending on DVD rental	Euro m	32.1	25.1	21.8	18.4	13.2	10.2	-23.0%
DVD rental transactions	m	11.9	9.2	8.1	6.8	4.9	3.9	-20.0%
Average rental price	Euro	2.70	2.71	2.70	2.70	2.70	2.60	-3.7%
Consumer level: BD rental								
Spending on BD rental	Euro m		0.13	0.44	1.00	1.32	1.49	12.9%
BD rental transactions	m		0.05	0.16	0.37	0.49	0.57	17.3%
Average rental price	Euro	2.70	2.71	2.70	2.70	2.70	2.60	-3.7%

Source: IHS/IVF

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.