Netherlands

Netherlands: key data

Population	16.8m
TV households	7.3m
DVD households (penetration)	77.7%
Blu-ray Disc household (penetration)	9.9%
Distributor revenues from video software	€ 143m
Comparison with 2011	-27.0%
DVD/Blu-ray Disc split	€ 117.7m / € 25.3m
Video software rental/retail split	1/99
Consumer spending on video software	€ 240.5m
Comparison with 2011	-20.1%
DVD/Blu-ray Disc split	€ 202.9m / € 37.6m
Video software rental/retail split	5/95
Consumer spending on digital video and TV VOD	€ 47.1m
Comparison with 2011	63.9%
Digital video/TV VOD split (%)	17 / 83

DVD and Blu-ray market

Overall consumer spending on films and television series on physical carriers decreased by more than 18 per cent in 2012. A slight increase in turnover of 2 per cent of Blu-ray did not at all compensate for the loss in DVD.

Film sales on physical format decreased more than the sales of television series. Three million fewer films were sold in 2012 compared to 2011. The number of titles that sold more than 100.000 copies reduced from five titles in 2011 to two titles in 2012. This development is disturbing in view of the great importance that the sale of physical products has for the financing of films.

This decrease was mainly due to the diminishing numbers of points of sale – resulting in less consumer exposure to products on offers – and the transition to digital consumption.

Best selling movie on DVD in 2012 was the French movie "Intouchables". Two Dutch movies were in the top ten: "Nova Zembla", released by Benelux Film Distributors and "Achtste-groepers huilen niet" by Dutch Filmworks.
Online distribution

The market for online distribution services is developing fast, but it did not compensate for the loss in physical sales. Digital turnover grew by 63,9 per cent to 47 million euro. Overall, the home entertainment market went down by 12.8 per cent. The VOD market is dominated by television providers as Ziggo, KPN and UPC. In 2012, the number of consumers using these online services grew. It is expected that the turnover of online distribution by these services will grow further and that greater availability of Internet services will boost the market.

Other relevant developments

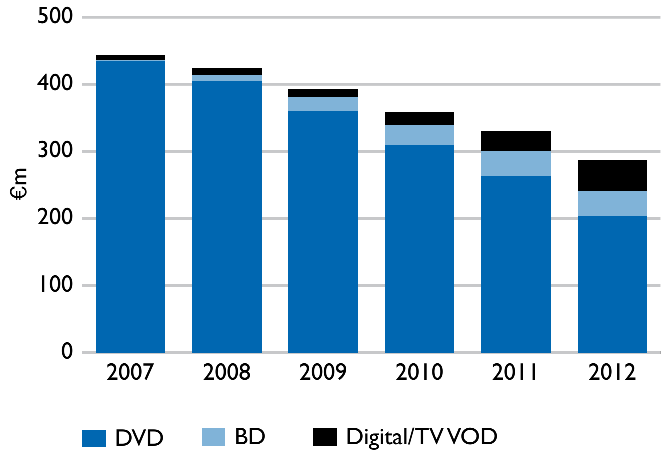
In the Netherlands, the number of cinemas visitors increased again in 2012, although slightly, to 30,6 million visitors. Turnover also increased by 2 per cent. In 2012, all the cinemas in the Netherlands have been digitized, which is a unique achievement. Despite the fact that 2012 was a positive year for cinemas, there are worries due to the economic circumstances. It is feared that budget cuts by the Dutch government will have a negative effect on film production and have detrimental consequences for the Dutch film industry.

The Dutch anti-piracy organization BREIN has performed 651 investigations regarding illegal files and copies of music, film, TV series, books and games. 571 illegal services were closed down of which the majority were taken down by hosting providers. In 2012, a Dutch court ordered the blocking of access from the Netherlands to The Pirate Bay (TPB). Usage of TPB in the Netherlands has therefore gone down.

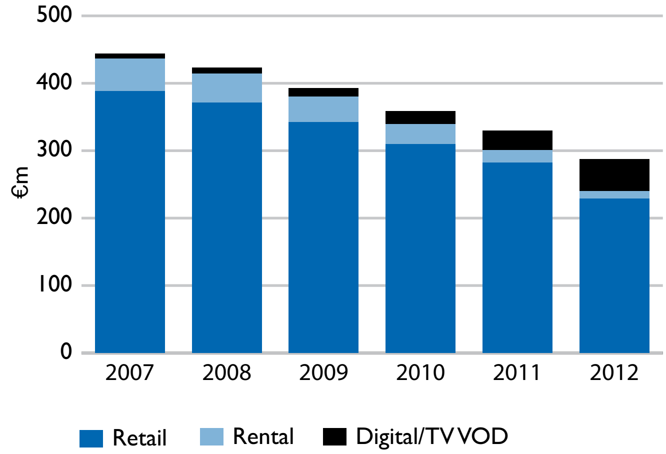
The future of copyright is still subject to discussion in the Dutch government and the Dutch Parliament. The Dutch Parliament voted against introducing a ban on downloading from illegal sources out of fear that it would be considered as targeting end-users, despite repeated arguments by right holders that any such measures would focus on those who facilitate illegal use of copyright content. The question of the relationship between illegal downloading and the private copy exception has been put before the Court of Justice of the European Union.

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

Consumer spending by format



Consumer spending by sector



		2007	2008	2009	2010	2011	2012	12/11
EXCHANGE RATES								
Exchange rate: $1=	Euro	0.73	0.68	0.72	0.75	0.72	0.78	
GENERAL								
Population	m	16.5	16.5	16.6	16.7	16.7	16.8	0.3%
Households	m	5.2	5.2	5.3	5.3	5.3	5.4	0.6%
HARDWARE								
TV households	m	7.1	7.2	7.2	7.2	7.3	7.3	0.4%
DVD sector								
DVD Video player/recorder households	m	6.1	6.2	6.2	6.2	6.3	5.7	-9.3%
Penetration of TV households	%	85.8	86.7	86.1	85.8	86.0	77.7	
DVD console households	m	1.2	1.3	1.4	1.4	1.5	1.5	-1.5%
Penetration of TV households	%	17.0	18.4	19.1	19.8	20.7	20.3	
BD sector								
BD standalone player households	m	0.0	0.035	0.147	0.3	0.5	0.7	34.1%
Penetration of TV households	%	0.0	0.483	2.041	4.6	7.4	9.9	
PS3 console households	m	0.1	0.252	0.417	0.6	0.8	0.9	21.0%
Penetration of TV households	%	1.5	3.518	5.789	8.1	10.7	12.9	

Total video software market

		2007	2008	2009	2010	2011	2012	12/11
CONSUMER LEVEL ALL VIDEO								
Total market figures include spending on both physical and digital video								
Total spending on all video	Euro m	443.7	423.4	393.1	358.6	329.9	287.6	-12.8%

		2007	2008	2009	2010	2011	2012	12/11
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	280.4	276.8	253.5	219.9	196.0	143.0	-27.0%
Total revenues from retail video	Euro m	265.9	263.6	242.9	213.9	192.5	141.3	-26.6%
Total revenues from rental video	Euro m	14.5	13.2	10.6	6.0	3.5	1.7	-51.5%

Video market: Netherlands

		2007	2008	2009	2010	2011	2012	12/11
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	437.0	414.2	380.2	339.4	301.2	240.5	-20.1%
Total spending on retail video	Euro m	388.1	371.4	342.5	309.6	282.0	228.7	-18.9%
Total spending on rental video	Euro m	48.9	42.8	37.7	29.8	19.2	11.8	-38.3%

		2007	2008	2009	2010	2011	2012	12/11
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	0.7	1.2	1.5	1.9	3.3	8.0	144.4%
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	6.0	8.0	11.4	17.2	25.5	39.1	53.6%

Retail video market

		2007	2008	2009	2010	2011	2012	12/11
Outlets stocking retail video	no.	3,000	3,000	2,900	2,800	2,100	1,750	
Retail chains with 10 or more outlets	no.	9	9	9	8	6	5	
Kiosks stocking retail video	no.							
Trade level: DVD retail								
Revenues from retail DVD	Euro m	261.9	253.8	225.4	195.6	167.0	116.3	-30.3%
Retail DVD units shipped to trade	m	35.3	34.1	31.4	26.5	21.3	17.2	-19.3%
Average trade price	Euro	7.42	7.44	7.18	7.38	7.85	6.78	-13.7%
Number of titles released	no.	4,250	4,290	3,732	3,174	2,611	2,980	14.1%
Trade level: BD retail								
Revenues from retail BD	Euro m	3.2	9.8	17.5	18.2	25.5	25.0	-2.0%
Retail BD units shipped to trade	m	0.2	0.7	1.3	1.6	2.4	2.3	-3.0%
Average trade price	Euro	16.24	13.81	13.48	11.50	10.85	10.96	1.0%
Consumer level: DVD retail								
Spending on retail DVD	Euro m	385.7	361.7	323.5	280.9	245.8	191.8	-22.0%
Retail DVDs sold to consumers	m	35.2	34.8	31.0	26.2	24.9	19.0	-23.5%
Average consumer price	Euro	10.96	10.41	10.45	10.74	9.87	10.07	2.0%
Consumer level: BD retail								
Spending on retail BD	Euro m	1.8	9.620	19.010	28.7	36.2	36.9	2.0%
Retail BDs sold to consumers	m	0.1	0.370	0.860	1.5	2.3	2.4	1.1%
Average consumer price	Euro		26.00	22.10	18.86	15.42	15.57	0.9%

Rental video market

		2007	2008	2009	2010	2011	2012	12/11
Rental video market data includes both store-based rental and physical rent-by-mail operations where relevant.								
Video rental outlets	no.	800	700	600	510	340	260	-23.5%
Rental chains with 10 or more outlets	no.	14	14	12	10	7		
Trade level: DVD rental								
Revenues from rental DVD	Euro m	14.5	13.1	10.2	5.6	2.9	1.4	-51.3%
Rental DVD units shipped to trade	m	1.1	1.1	0.9	0.4	0.2	0.1	-43.6%
Average trade price	Euro	13.17	12.09	11.00	13.02	16.76	14.48	-13.6%
Number of titles released	no.	750	750	730	690	600	550	-8.3%
Trade level: BD rental								
Revenues from rental BD	Euro m		0.10	0.337	0.376	0.611	0.291	-52.4%
Rental BD units shipped to trade	m		0	0.025	0.028	0.034	0.021	-37.9%
Average trade price	Euro		12.83	13.72	13.50	17.90	13.74	-23.3%
Number of titles released	no.		388	429	470	510	468	-8.2%
Consumer level: DVD rental								
Spending on DVD rental	Euro m	48.9	42.8	37.1	28.5	18.1	11.1	-38.7%
DVD rental transactions	m	15.4	13.0	11.2	8.4	5.5	3.3	-39.7%
Average rental price	Euro	3.18	3.30	3.31	3.38	3.31	3.36	1.6%
Consumer level: BD rental								
Spending on BD rental	Euro m		0.04	0.577	1.391	1.084	0.747	-31.1%
BD rental transactions	m		0.01	0.174	0.412	0.328	0.222	-32.3%
Average rental price	Euro		3.30	3.31	3.38	3.31	3.37	1.8%

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

Combined DVD & Blu-ray Disc retail top 10

Rank	Title	Distributor
1	Intouchables	Filmfreak
2	Twilight Saga - Breaking Dawn Part 1	Belga HV
3	Ice Age 4 - Continental Drift	Twentieth Century Fox
4	The Avengers (2012)	Walt Disney
5	Game Of Thrones	Warner Bros.
6	The Hunger Games	Belga HV
7	Nova Zembla	BFDHE
8	Bridge	Lumiere
9	De Avonturen Van Kuifje; Het Geheim Vd Eenhoorn	Sony Pictures
10	Borgen	Lumiere

Source: GfK/NVPI