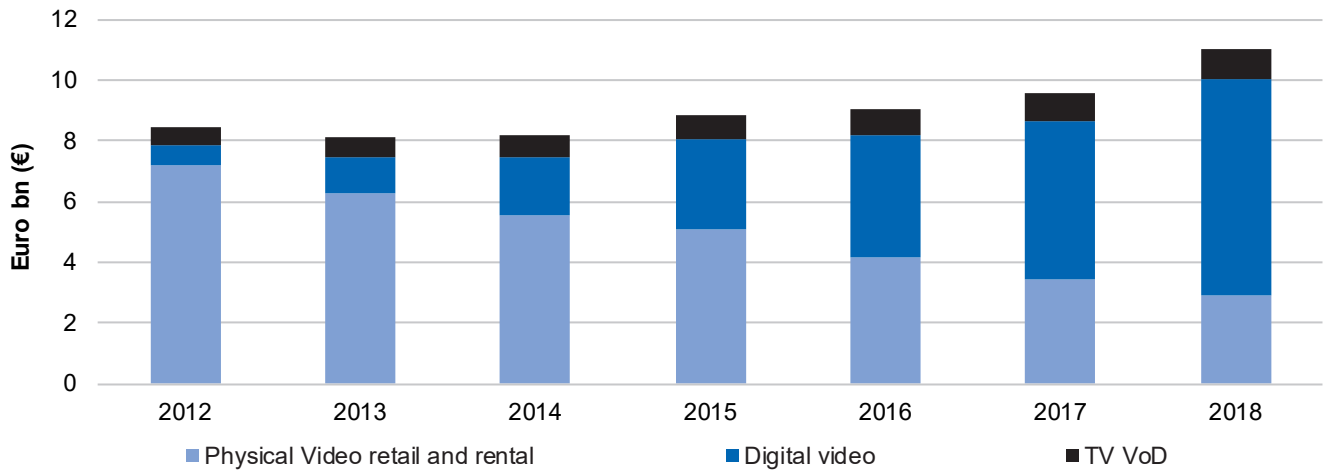


Total Europe

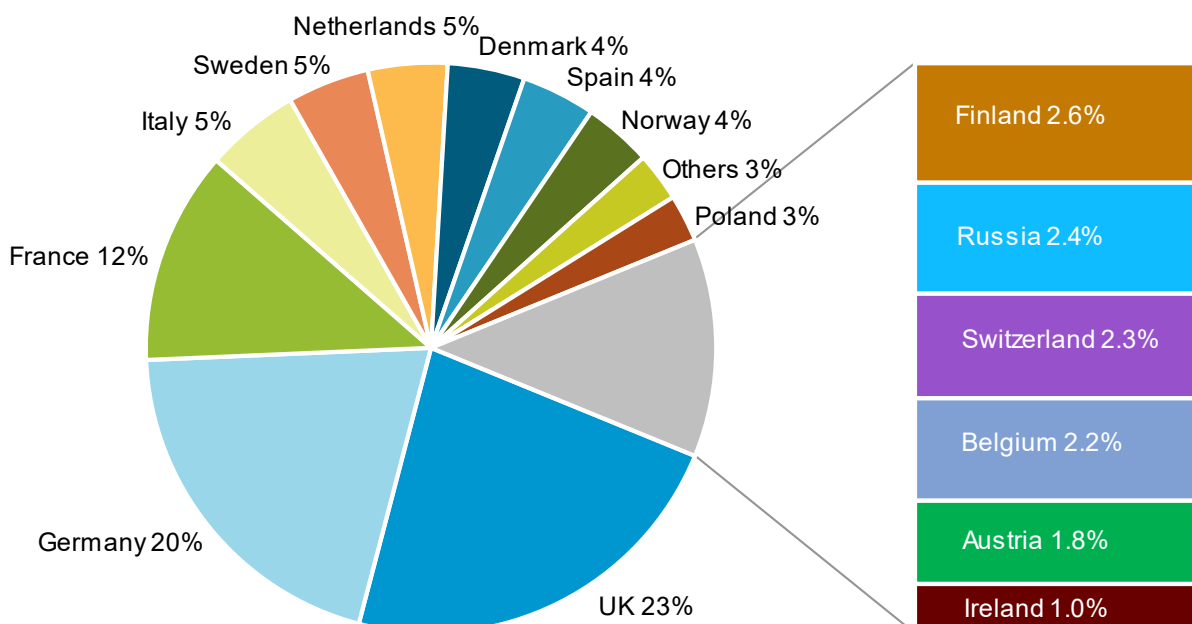
Total Europe key data 2018

Population (m)	632.3	Consumer spending on digital video and TV VoD (EUR m)	8,785.6
TV households (m)	264.9	Comparison with 2017	30.9%
Consumer spending on physical video software (EUR m)	2,970.0	Consumer spending on total video (EUR m)	11,755.7
Comparison with 2017	-15.8%	Comparison with 2017	14.8%

Consumer spending by segment



Total Europe share on total consumer spending on all video by countries



Video market: Europe	2012	2013	2014	2015	2016	2017	2018	17/18 %
GENERAL								
Population (m)	623.8	624.9	626.1	627.7	629.4	630.9	632.3	0.2%
TV households (m)	253.2	255.0	257.3	259.3	261.3	263.2	264.9	0.7%
DVD Video player/recorder (%)	76.1	73.8	71.7	69.2	66.8	64.2	61.5	-4.2%
Blu-ray Disc player/recorders penetration (%)	11.2	15.4	18.4	20.7	21.7	22.3	22.2	-0.3%
OTT Subscriptions (m)	4.9	9.4	18.4	30.4	44.2	60.6	79.8	31.7%

Total video software market	2012	2013	2014	2015	2016	2017	2018	17/18 %
CONSUMER LEVEL ALL VIDEO								
<i>Total market figures include consumption of both physical and digital video</i>								
Total spending on video (EUR m)	8,824.2	8,449.5	8,513.6	9,183.9	9,474.6	10,236.3	11,755.7	14.8%
CONSUMER LEVEL PHYSICAL VIDEO – TOTAL SPENDING								
<i>Total market figures include consumption of legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.</i>								
Physical video rental (EUR m)	865.1	683.1	526.3	430.2	293.1	212.9	152.0	-28.6%
Physical video retail (EUR m)	6,607.5	5,808.5	5,184.7	4,756.8	3,989.8	3,312.4	2,818.0	-14.9%
Physical video software (EUR m)	7,472.6	6,491.6	5,711.0	5,187.0	4,282.9	3,525.3	2,970.0	-15.8%
CONSUMER LEVEL DIGITAL VIDEO (OTT) – TOTAL SPENDING								
<i>The purchase or rental of films and TV series delivered over the open internet through transactional models (also known as EST, DTO, Internet VOD) or on a subscription basis. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.</i>								
Retail digital video (EUR m)	268.8	348.3	441.0	525.8	566.2	621.5	698.3	12.4%
Rental digital video (EUR m)	201.1	276.2	347.1	409.8	433.7	466.0	472.6	1.4%
Subscription digital video (EUR m)	247.0	631.2	1,232.9	2,192.2	3,287.2	4,632.1	6,566.2	41.8%
Total digital video (EUR m)	716.9	1,255.7	2,021.0	3,127.8	4,287.2	5,719.6	7,737.1	35.3%
CONSUMER LEVEL PAY TV TRANSACTIONAL VOD – TOTAL SPENDING								
<i>The rental of film and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services. These, paid for at the point of consumption, transactions occur only on set-top-boxes or through online services provided as part of a wider pay TV package to which consumers must subscribe prior to purchase. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.</i>								
Pay TV TVOD (EUR m)	634.8	702.1	781.5	869.0	904.6	991.6	1,048.5	5.7%

Notes: 1) Consumer level digital video (OTT) and pay TV transactional VOD figures may differ from locally published figures due to the application of different definitions. 2) Historical numbers in this section may differ from those published in previous years owing to changes in IHS Markit methodology. 3) The current online figures are a snapshot of the market in March 2019. Figures are updated regularly and so it may not be possible to compare directly to figures published after this date. 4) Total Europe includes Austria, Belgium, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, UK, Croatia, Czech Republic, Hungary, Poland, Russia, and Slovakia. 5) OTT Subscriptions are subscriptions to online channels and virtual pay TV operators. Figures exclude multiscreen services of pay TV operators.