

Statistics in focus

INDUSTRY, TRADE AND SERVICES

THEME 4 – 21/2002

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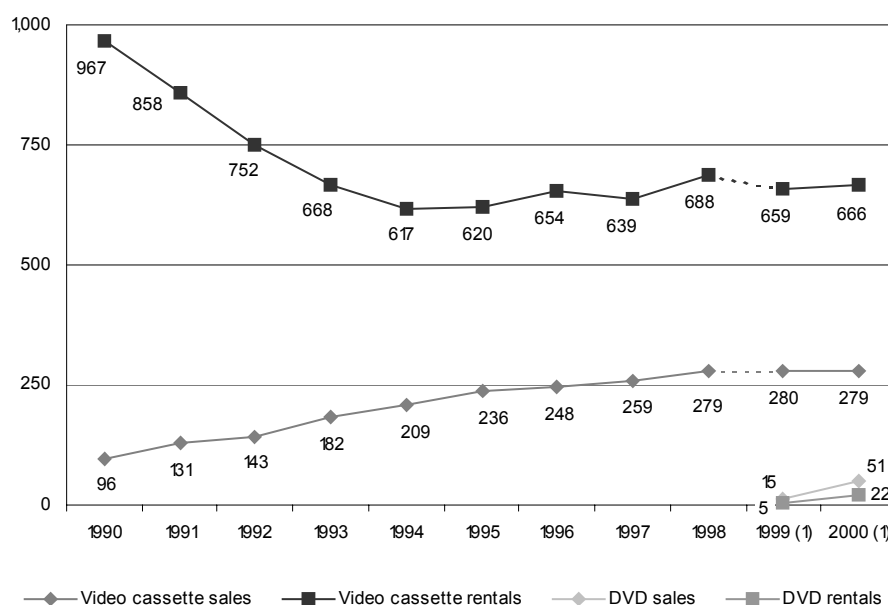
Video and DVD statistics

*Rapid growth in DVD sales and rentals
between 1999 and 2000*

Richard Deiss

- There were almost 5 million DVD households in the EU in 2000, some 3.2% of all households; the number of DVD households increased 2.4-fold between 1999 and 2000;
- There were 111 million VCR households in the EU in 2000, 72% of all households;
- The number of DVD sales in the EU increased by 352% between 1999 and 2000 to reach 51 million units, while there were 279 million video cassette sales (virtually the same number as in 1999);
- The number of DVD rentals increased by 465% between 1999 and 2000 to reach 22 million units, while there were 666 million video cassette rentals;
- The EU's video cassette market is estimated to have generated 5.8 billion EUR of turnover in 2000, on average more than 15 EUR per inhabitant; turnover was split roughly two-thirds for sales and one-third for rentals; the United Kingdom was the largest market and accounted for over one-third of EU turnover generated through the sale and rental of videos in 2000;
- Turnover from the sale of DVD discs was estimated at 1.3 billion EUR in the EU in 2000 and turnover from DVD rentals at 0.08 billion EUR.

Figure 1: Number of video cassettes and DVDs sold and rented in the EU (millions)



(1) E and I, not available for DVD rentals.

Source: Eurostat Auvis database; The European Video Yearbook 2001/2002



VCR and DVD household penetration rates

Table 1: Number of TV, VCR and DVD households and household penetration rates

	TV households		VCR households		DVD households	
	Year	(thousands) (%)	Year	(thousands) (%)	Year	(thousands) (%)
EU-15 (1)	(2000)	147,742 95.8	(2000)	110,831 72.4	(2000)	4,946 3.2
EUR-12 (1)	(2000)	117,048 96.0	(2000)	83,486 68.4	(2000)	3,450 2.8
B (2)	2000	4,100 95.0	2000	3,200 74.2	2000	180 4.2
DK (3)	2000	2,349 96.5	1999	2,011 83.0	2000	71 2.9
D	2000	37,362 99.7	2000	25,700 68.6	2000	1,100 2.9
EL	1998	3,663 99.0	1999	1,465 38.2	1998	15 0.4
E (4)	2000	12,106 93.3	2000	9,100 70.1	2000	363 2.8
F	2000	22,700 93.0	2000	18,000 73.7	2000	1,188 4.9
IRL	1999	1,187 95.0	1998	844 69.0	1998	8 0.6
I (3)	2000	20,706 95.6	2000	13,852 64.0	2000	310 1.4
L	1998	162 100.0	1998	117 72.2	1998	: :
NL (3)	2000	6,734 98.7	2000	5,223 76.6	2000	211 3.1
A	1998	3,032 94.0	1998	2,340 73.0	1998	17 0.5
P	1998	3,037 91.1	1998	1,973 59.2	1998	13 0.4
FIN	2000	2,259 95.5	2000	1,672 70.7	2000	45 1.9
S (3)	2000	4,045 93.0	2000	3,334 76.7	2000	113 2.6
UK (2)	2000	24,300 94.9	2000	22,000 85.9	2000	1,312 5.1
Iceland	2000	99 98.0	2000	89 88.1	2000	9 8.9
Norway (5)	2000	1,900 95.0	2000	1,600 80.0	2000	82 4.1
Switzerland (5)	1998	2,653 86.0	1998	2,037 66.0	1998	51 1.7

The number of TV households in the EU was 148 million, or 95.8% of the total in 2000 (note that this figure says nothing about whether households had one, two, three or more TV sets), whilst the corresponding penetration rates for VCRs and DVDs were 72.4% and 3.2%.

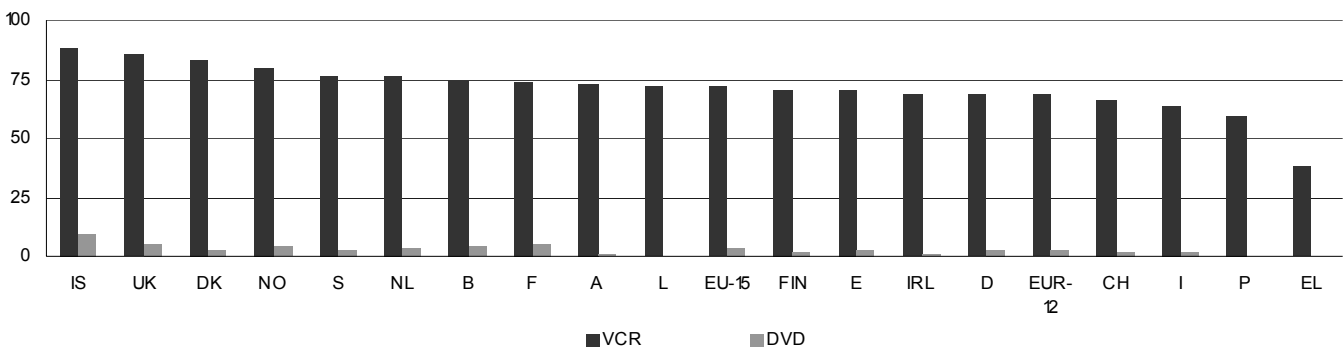
The VCR market became saturated within the EU during the 1990s and there was little change in penetration rates from the mid-1990s onwards. This more or less coincided with the introduction of DVD technology (announced in 1995).

DVD players are only at the beginning of their product life-cycle and penetration rates remain well below 10% in the EU, with the highest penetration rates recorded in the United Kingdom, France and Belgium. Whilst the number of DVD households in the EU remained relatively low, at almost 5 million, their growth was at a rapid pace, rising from 0.15% of all households in 1998 to 0.9% in 1999 and 3.2% by 2000. Whilst it is early to draw conclusions, the countries with the highest penetration rates for VCRs also generally appeared at the top of the ranking for DVD penetration.

(1) Mixed years and sources using latest available information; DVD households, excluding L. (2) TV, VCR and DVD households, source: The European Video Yearbook 2001/2002. (3) DVD households, source: The European Video Yearbook 2001/2002. (4) VCR and DVD households, source: The European Video Yearbook 2001/2002. (5) Source: The European Video Yearbook 2001/2002.

Source: Eurostat Auvis database

Figure 2: Share of households owning a VCR or DVD, 2000 (%) (1)



(1) See footnotes to table 1.

Source: Eurostat Auvis database, The European Video Yearbook 2001/2002

Number of enterprises, persons employed and outlets

Table 2: Number of enterprises and persons employed in the motion picture and video activities sector (NACE Group 92.1)

	Year	Number of enterprises	Number of persons employed	Persons employed per enterprise
EU-15 (1)	1999	38,000	202,000	5.3
B	2000	2,327	3,131	1.3
DK	1999	1,226	4,694	3.8
D	1999	7,439	30,000	4.0
EL	1995	316	2,065	6.5
E	1997	3,427	19,301	5.6
F	1998	5,888	45,126	7.7
IRL	:	:	:	:
I	1998	3,872	20,573	5.3
L (2)	1998	114	298	2.6
NL	1992	2,790	9,380	3.4
A	1991	507	2,309	4.6
P	1999	681	4,071	6.0
FIN	1999	548	1,952	3.6
S	1999	2,029	5,962	2.9
UK	1999	5,171	41,846	8.1

(1) Estimates. (2) Number of employees instead of number of persons employed.

Source: Eurostat Auvis database

Table 3: Number of outlets selling or renting videos

	Year	Number of outlets selling videos		Number of outlets renting videos	
		(thousands)	(per 100,000 inhabitants)	(thousands)	(per 100,000 inhabitants)
EU-15 (1)	(1998)	42.4	11.3	25.6	7.0
EUR-12 (1)	(1998)	30.6	10.5	19.3	6.6
B	1997	1.9	18.6	0.7	6.9
DK	1998	1.8	34.0	2.0	38.2
D (2)	2000	10.0	12.2	4.6	5.6
EL	1997	0.2	1.4	0.5	5.0
E	1998	3.1	7.8	4.6	11.7
F	1997	5.0	8.5	0.9	1.5
IRL	1998	1.7	44.7	1.1	29.8
I	1999	3.5	6.1	3.5	6.1
L	1999	:	:	0.0	3.7
NL (3)	2000	2.5	16.0	1.3	7.9
A	1998	0.8	9.3	0.4	4.3
P	2000	0.4	4.0	0.7	7.2
FIN	2000	1.5	29.0	1.0	19.3
S	1997	5.0	56.5	0.6	6.8
UK	2000	5.0	8.3	3.7	6.2
Iceland (4)	2000	0.0	12.8	0.2	71.4
Norway	1998	1.8	39.6	0.5	10.6
Switzerland	1997	1.4	19.7	0.4	4.9
United States	1995	50.0	18.6	27.9	10.4
Japan (4)	1996	18.5	14.7	10.0	7.9

(1) Mixed years using latest available information; outlets selling videos, excluding L. (2) Outlets selling videos, 1997. (3) Outlets selling videos, 1998. (4) Outlets selling videos, 1995.

Source: Eurostat Auvis database

There were an estimated 202 thousand persons employed in the EU's motion picture and video activities (NACE Group 92.1) in 1999, with France and the United Kingdom accounting for the highest shares, at over one-fifth of the total (with 45 and 42 thousand persons employed respectively); these two countries also reported the highest average number of persons employed per enterprise. Note that the figures in table 2 relate to the production and distribution of motion pictures and video tapes to other industries, as well as to the projection of movies in cinemas or at open air venues (the figures do not include enterprises engaged in retail or rental activities, in relation to the general public).

Table 3 contains information on the network of retail outlets selling and renting videos. This area saw a marked transformation during the 1990s, as the number of rental outlets in the EU declined by 40% between 1990 and 1996. More recent data suggests that the number of rental outlets stabilised and in some countries grew during the period 1997 to 2000. It is likely that most video rental outlets now stock DVDs as well as videos and this may have influenced the trend observed in the number of rental outlets in the late 1990s.

The density of the retail network of shops selling and renting videos varies considerably between the Member States. The highest ratios of outlets per 100 thousand inhabitants were recorded in Denmark, Ireland, Sweden and Finland. Outside of the EU, two more Nordic countries also reported a high retail density (Iceland and Norway). The retail network for videos was denser in the US than it was in the EU.

Turnover and per capita spending on videos

Table 4: Turnover from pre-recorded video cassette sales and rentals (1)

	Year	Sales		Rentals	
		(million EUR)	(EUR per capita)	(million EUR)	(EUR per capita)
EU-15 (2)	(2000)	3,713	9.83	2,076	5.50
EUR-12 (2)	(2000)	2,183	7.45	1,171	4.00
B	2000	75	7.31	68	6.62
DK	2000	84	15.76	70	13.13
D	2000	423	5.15	328	3.99
EL	1998	7	0.60	12	1.20
E	2000	166	4.10	178	4.39
F (3)	2000	964	16.37	229	3.90
IRL	1998	37	10.00	77	20.90
I	2000	263	4.55	107	1.85
L	1997	3	7.30	1	3.30
NL	2000	104	6.56	105	6.61
A	1998	57	7.00	31	3.80
P	1998	33	3.30	12	1.20
FIN	1999	51	9.88	24	4.70
S	2000	67	7.56	82	9.22
UK	2000	1,379	23.01	753	12.57
Iceland	1999	4	14.09	10	36.97
Norway	2000	42	9.33	60	13.30
Switzerland	1997	55	7.80	30	4.20
United States (4)	2000	7,531	28.00	8,250	29.80
Japan	1998	1,359	10.80	2,625	20.80

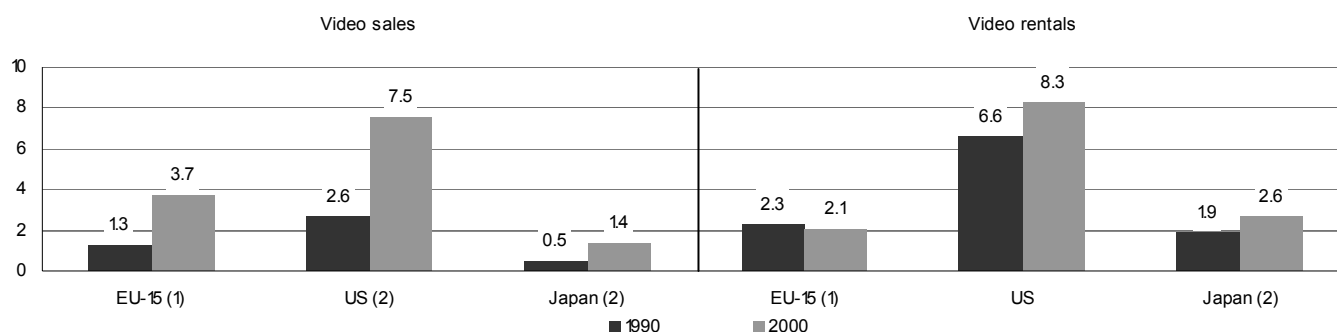
(1) B, DK, D, E, I, NL, S, UK and NO, source: *The European Video Yearbook 2001/2002*. (2) Mixed years and sources using latest available information. (3) Sales, source: *The European Video Yearbook 2001/2002*; rentals, 1999. (4) Sales, 1998; rentals, source: *The European Video Yearbook 2001/2002*. Source: Eurostat Auvis database

The EU's video market is estimated to have generated 5.8 billion EUR of turnover in 2000. This was split roughly two-thirds for sales and one-third for rentals (as was the breakdown for the density of the retail network, see previous page).

The United Kingdom was the most important market for both sales and rentals in the EU in 2000, accounting for 37% of the turnover generated by the sale of videos in the EU and 36% of the turnover from video rentals. In terms of per capita spending on video purchases, the United Kingdom was confirmed as the most important market in the EU, as each inhabitant spent an average of 23.01 EUR. The rentals market was more developed in Ireland, where each inhabitant spent, on average, 20.90 EUR in 1998. This was well ahead of the United Kingdom (12.57 EUR, in 2000) and Denmark (13.13 EUR, also in 2000), the only other countries to report average expenditure on video rentals above 10.00 EUR per inhabitant.

Figure 3 shows that the video market in the US is more developed than in the EU. There was growth during the course of the 1990s in both the US and Japan in the turnover generated from the sale and rental of videos. As a result, both the US (8.3 billion EUR) and Japan (2.6 billion EUR, 1998) recorded higher revenues from video rentals than the EU (2.1 billion EUR).

Figure 3: Turnover from pre-recorded video cassette sales and rentals (billion EUR)



(1) Mixed years and sources using latest available information; see footnotes to table 4. (2) 1998 instead of 2000. Source: Eurostat Auvis database, *The European Video Yearbook 2001/2002*

Sales and rentals of video cassettes

Table 5: Number of video cassettes, sales and rentals

	Year	Sales (1)		Rentals (2)	
		(millions)	(per VCR household)	(millions)	(per VCR household)
EU-15 (3)	(2000)	278.5	2.5	665.5	6.0
EUR-12 (3)	(2000)	167.3	2.0	449.9	5.4
B	2000	6.3	2.0	23.8	7.4
DK	2000	6.6	2.7	20.1	8.3
D	2000	35.9	1.4	126.0	4.9
EL (4)	2000	0.5	0.4	7.5	7.3
E	2000	14.0	1.5	89.7	9.9
F	2000	55.0	3.1	67.6	3.8
IRL (4)	2000	3.0	3.5	28.8	34.2
I	2000	28.5	2.1	46.3	3.3
L (5)	1998	0.1	1.2	0.6	5.0
NL	2000	9.5	1.8	37.0	7.1
A (4)	2000	3.3	1.9	9.1	4.8
P (4)	2000	7.6	4.3	5.5	3.6
FIN (6)	2000	3.6	2.2	8.0	4.7
S	2000	7.7	2.3	17.5	5.2
UK	2000	97.0	4.4	178.0	8.1
Iceland	2000	0.2	2.1	2.8	31.5
Norway	2000	3.1	1.9	18.0	11.3
Switzerland (7)	2000	3.4	2.0	6.5	4.0
United States (8)	1998	700.9	8.3	3,325.0	40.9
Japan	1998	42.0	1.1	848.5	22.8

(1) B, DK, EL, E, F, IRL, I, A, UK, NO and CH, source: *The European Video Yearbook 2001/2002*. (2) All countries except L, FIN and JP, source: *The European Video Yearbook 2001/2002*. (3) Mixed years and sources using latest available information. (4) Sales and rentals per VCR household, 1998. (5) Sales, 1993. (6) Rentals, 1999. (7) Sales and rentals per VCR household, 1997. (8) Rentals, total, 2000.

Source: Eurostat Auvis database

In quantity terms there were almost 280 million videos sold in the EU in 2000 (a comparable figure to that from 1998). During the 1990s the sale of video cassettes multiplied almost three-fold between 1990 and 1998, since when there was little or no development. The number of videos sold in the EU was well below the corresponding figure recorded in the United States, where just over 700 million units were sold in 1998.

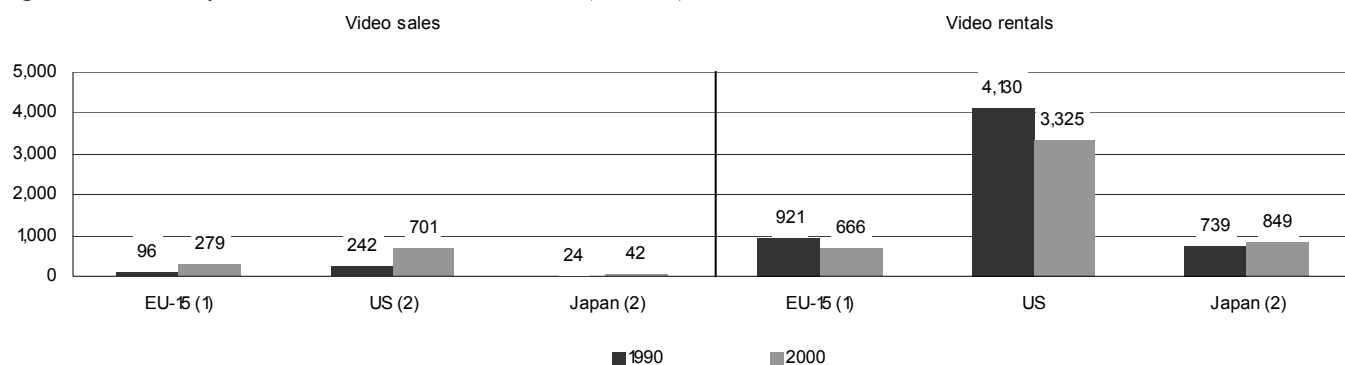
Within the EU the highest average number of sales per VCR household was recorded in the United Kingdom, with 4.4 in 2000, just ahead of Portugal (4.3 in 1998).

The number of video rental transactions was considerably higher than the number of sales. Some 666 million video rental transactions took place in 2000 in the EU, an average of 6.0 per VCR household. This average ranged from as high as 34.2 videos per VCR household in Ireland in 1998 to just 3.3 in Italy in 2000.

The number of video rentals in the US stood at 3.3 billion in 2000, a figure which was considerably down on that for 1990, when 4.1 billion units were rented. This decline in the number of units rented was repeated in the EU, where video rentals fell from 921 million to 666 million between 1990 and 2000. On the other hand, there was an increase in the number of videos rented in Japan between 1990 and 1998, rising from 739 million to 849 million, thus overtaking the EU in terms of the number of rented videos.

When looking at the average number of videos rented per VCR household the difference between the figures for the EU and those for the US and Japan were even greater. On average each VCR household in the EU rented 6.0 videos in 2000, while the corresponding rates in the US and Japan were 40.9 and 22.8 (1998) respectively.

Figure 4: Number of video cassettes, sales and rentals (millions)



(1) Mixed years and sources using latest available information; see footnotes to table 5. (2) 1998 instead of 2000.

Source: Eurostat Auvis database, *The European Video Yearbook 2001/2002*

The DVD market

Table 6: Key data for the DVD market

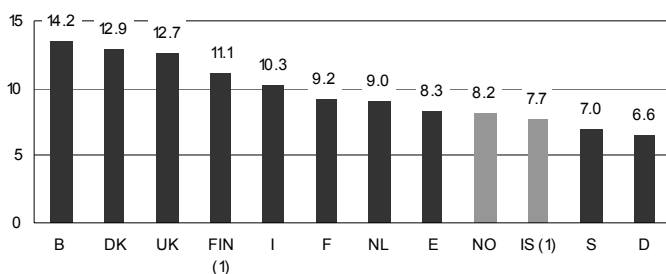
	Sales								Rentals					
	Revenues (million EUR)		Number of discs sold (thousands)		Average revenue per DVD household (EUR)		Average value of a DVD disc (EUR)		Revenues (million EUR)		Number of discs rented (thousands)		Average revenue per DVD household (EUR)	
	1999	2000	1999	2000	1999	2000	1999	2000	1999	2000	1999	2000	1999	2000
EU-15 (1)	380	1310	14,486	51,115	280	270	26	26	:	:	:	:	:	:
EUR-12 (1)	260	840	10,087	32,893	260	240	26	25	:	:	:	:	:	:
B	17.9	62.6	689	2,553	336	347	25.98	24.52	1.7	5.6	538	1,871	319	310
DK	4.9	24.0	183	898	170	345	26.78	26.73	0.5	1.8	138	442	25.0	25.5
D	42.6	170.2	2,100	8,200	188	137	20.29	20.76	1.6	12.6	500	5,200	5.0	11.5
EL	:	:	77	201	:	:	:	:	:	:	:	:	:	:
E	26.4	72.0	1,100	3,000	215	199	24.00	24.00	:	:	:	:	:	:
F	128.1	371.6	4,200	12,500	354	273	30.50	29.73	1.5	7.7	452	2,360	4.2	6.5
IRL	:	:	77	259	:	:	:	:	:	:	:	:	:	:
I	21.7	70.7	1,000	3,200	281	228	21.70	22.09	:	:	:	:	:	:
L	:	:	:	:	:	:	:	:	:	:	:	:	:	:
NL	14.5	53.1	500	1,900	213	252	29.00	27.95	2.8	8.2	970	3,000	41.2	38.9
A	:	:	121	415	:	:	:	:	:	:	:	:	:	:
P	:	:	63	165	:	:	:	:	:	:	:	:	:	:
FIN (2)	3.9	10.4	160	500	:	232	24.18	20.86	:	:	:	260	:	:
S	5.3	17.6	216	724	170	169	24.54	24.31	1.3	3.1	294	659	1.8	27.4
UK	102.5	433.5	4,000	16,600	427	330	25.63	26.11	3.8	36.1	1,015	8,000	17.0	27.5
Iceland (2)	0.8	2.1	24	69	379	235	31.58	30.70	:	:	42	:	:	:
Norway	4.4	14.9	175	667	193	182	25.14	22.34	0.1	1.8	17	320	4.4	22.0
Switzerland	:	:	860	2,105	:	:	:	:	:	:	:	:	:	:

(1) Excluding L; estimates other than for number of DVD discs sold. (2) Source: Eurostat Auvis database. Source: The European Video Yearbook 2001/2002

The rapid growth in DVD hardware markets has been mirrored in the growth of the number of DVD discs sold between 1999 and 2000 in the EU, rising from 14.5 million units to 51.1 million units. The DVD market can be expected to continue expanding at a rapid pace over the next few years, due to its inclusion as standard hardware on many PCs, its use within games consoles and also the development of home cinema systems.

The largest number of DVD discs sold in the EU was in the United Kingdom (16.6 million units), which replaced France (12.5 million units) as the most important DVD market between 1999 and 2000. The United Kingdom was also the most important market in terms of revenues generated from the sale of DVDs, with 434 million EUR. Each DVD household in the United Kingdom spent an average of 330 EUR on DVDs in 2000, a figure that was surpassed in Belgium (347 EUR) and Denmark (345 EUR).

Figure 5: Average number of DVDs sold per DVD household, 2000 (units)



(1) Source: Eurostat Auvis database. Source: The European Video Yearbook 2001/2002

Information for 2001¹ suggests that the DVD market continued to grow rapidly. Sales of DVDs in France and the United Kingdom (in the eleven months to November 2001) rose by 120% and 122% in volume terms compared to a year before. Turnover from the sale of DVDs in Germany reached 417 million EUR in 2001 (overtaking video cassette sales). These three countries together accounted for 73% of the DVDs sold in 2000. Applying their average growth rate of DVD sales between 2000 and 2001 to the EU total for 2000, it is possible to estimate that the number of DVDs sold in the EU rose to about 110 million units in 2001.

¹ Information provided by <http://www.ecran noir.fr>; <http://bva.org.uk> and <http://bvvideo.de>.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

SOURCES

This Statistics in Focus is based on audio-visual services statistics from the AUVIS domain of Eurostat's reference database New Cronos; the data are stored in theme 4, which covers industry, trade and services. Where official data sources do not provide adequate country information, additional data has been sourced from The European Video Yearbook 2001/2002, which is published by IVF (International Video Federation). In each table and graph the source of each data cell (country/indicator combination) is detailed in the footnotes.

DEFINITIONS

NACE Group 92.1 relates to the production and distribution of video and motion pictures. It excludes the renting of tapes to the general public (which is included in NACE Group 71.4, the renting of personal and household goods), as well as the retail sale of video tapes (which is included in NACE Class 52.45).

Average unit value of a DVD disc: is calculated as: revenues from DVD discs/number of DVD discs sold.

Number of enterprises: is a count of enterprises registered to the population concerned in the business register corrected for errors, in particular frame errors. Dormant units are excluded. The enterprise is the smallest combination of legal units which benefits from a certain degree of autonomy in decision-making, especially for the allocation of its current resources. An enterprise may be a single legal unit.

Number of employees: is defined as those persons who work for an employer and who have a contract of employment and receive compensation in the form of wages, salaries, fees, gratuities, piecework pay or remuneration in kind. The number of employees includes part-time workers, seasonal workers, persons on strike or on short-term leave, but excludes those persons on long-term leave. The number of employees does not include voluntary workers.

Number of persons employed: is defined as the total number of persons who work in the observation unit (inclusive of working proprietors, partners working regularly in the unit and unpaid family workers), as well as persons who work outside the unit who belong to it and are paid by it (e.g. sales representatives, delivery personnel, repair and maintenance teams). It includes persons absent for a short period (e.g. sick leave, paid leave or special leave), and also those on strike, but not those absent for an indefinite period. It also includes part-time workers, as well as seasonal workers, apprentices and home workers on the pay-roll.

Video outlet: video shop selling or renting video cassettes.

Turnover: comprises the totals invoiced by the observation unit during the reference period, corresponding to market sales of goods or services supplied to third parties. Turnover includes all duties and taxes on the goods or services invoiced by the unit with the exception of the VAT. It also includes all other charges (transport, packaging, etc.) passed on to the customer, even if these charges are listed separately in the invoice.

ABBREVIATIONS

DVD	Digital Versatile Disc
EUR	Euro
NACE	Statistical Classification of economic activities in the European Community
PC	Personal Computer
TV	Television
VCR	Video Cassette Recorder

COUNTRIES

EU	European Union
EU-15	fifteen Member States of the European Union
EUR-12	twelve Member States in the euro-zone
B	Belgium
DK	Denmark
D	Germany
EL	Greece
E	Spain
F	France
IRL	Ireland
I	Italy
L	Luxembourg
NL	the Netherlands
A	Austria
P	Portugal
FIN	Finland
S	Sweden
UK	the United Kingdom
CH	Switzerland
IS	Iceland
NO	Norway
US	United States

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