

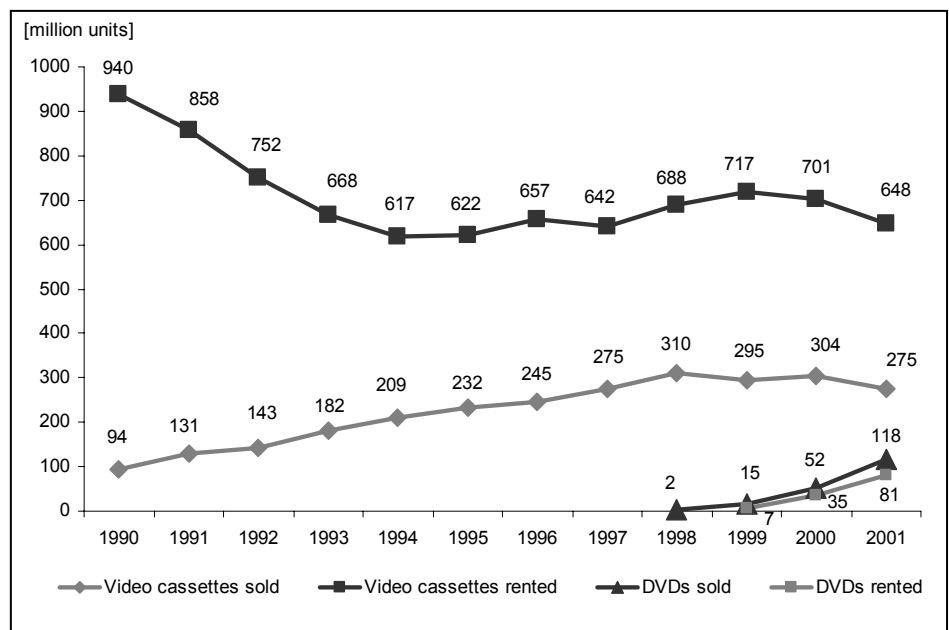
DVD and video statistics

The total DVD and video market increased by 20% in 2001

Andreas Dollt

- There were almost 13 million DVD households in the EU in 2001, representing some 9% of all households. The number of DVD households increased nearly threefold between 2000 and 2001. There were 114 million VCR households in the EU in 2001, or 76% of all households.
- The total DVD and video market in the EU increased by 1.5 billion euro (+20%) to 8.9 billion euro in 2001. Sales of pre-recorded video cassettes still account for the majority of the total EU-15 turnover (41%), although the format lost 12 percentage points compared with 2000. The DVD format accounts for 36% of the turnover (33% sales and 3% rentals);
- In 2001, EU turnover from DVD sales was estimated at 2.9 billion euro and turnover from DVD rentals at 0.3 billion euro.
- The EU video cassette market is estimated to have generated turnover of 5.7 billion euro in 2001, an average of approximately 15 euro per inhabitant; turnover was split roughly two-thirds for sales and one-third for rentals.
- There were still more video cassettes (275 million) than DVDs (118 million) sold in EU-15 in 2001. Whilst the number of DVDs sold increased by 127%, video cassette sales fell by 9.5%.
- There were still many more video cassettes (648 million) than DVDs (81 million) rented in EU-15 in 2001. Whilst the number of DVDs rented increased by 134%, video cassette rentals fell by 7.6%.

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



Source: Eurostat Auvis database; The European Video Yearbook 2002/2003

Statistics in focus

INDUSTRY, TRADE AND SERVICES

THEME 4 – 34/2003

SECTORIAL PROFILES

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DVD and VCR household penetration rates

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

	TV households			VCR households			DVD households		
	(1000)		(%)	(1000)		(%)	(1000)		(%)
	2000	2001	2001	2000	2001	2001	2000	2001	2001
EU-15	147 862	150 332	97	109 506 a)	113 840 a)	76	4 634 a)	12 884 a)	9
BE	:	4 130 f)	96	3 200 b)	3 200 b)	77	184	425	10
DK	2 349	2 379	98	2 007 h)	2 063 h)	87	120 b)	260 b)	11
DE	37 362	37 687	100	25 124	26 381	70	1 182	3 153	8
EL	:	3 969 h)	99	1 470	:	37	50 f)	160 f)	4
ES	12 106	13 052	97	9 100 b)	9 300	71	300 b)	850 b)	7
FR	22 700	22 900	94	18 000	18 695	82	1 188	2 888	13
IE	1 190	1 240 f)	98	910 f)	940 f)	76	30 f)	90 f)	7
IT	20 706	21 020	96	13 852	14 567	69	300	605	3
LU	160 g)	160	98	110 f)	120 f)	75	:	:	:
NL	6 734	6 800 f)	99	5 223	5 300 b)	78	212	672	10
AT	3 200 g)	3 230 f)	98	2 670 f)	2 720 f)	84	60 f)	250 f)	8
PT	3 120 g)	3 040 f)	99	1 789	1 910 f)	63	30 f)	100 f)	3
FI	2 259	2 278	96	1 672 c)	1 709 c)	75	45 c)	95 c)	4
SE	4 050 i)	4 047	98	3 334	3 500 b)	86	103	317	8
UK	24 420 g)	24 400	97	20 600	:	84	823 d)	3 000 d)	12
CZ	3 812 f)	3 944 f)	100	2 340 f)	2 460 f)	62	60 f)	170 f)	4
HU	3 628 f)	3 617 f)	97	1 400 b)	1 449 b)	40	16 b)	98 b)	3
PL	12 106	12 081	97	8 100 b)	8 800 b)	73	100 b)	200 b)	2
IS	98	99	98	89	91	92	9	19	19
NO	1 970 g)	:	99	1 600 b)	1 700 b)	86	83 b)	191 b)	10
CH	3 030 g)	:	95	2 460 f)	2 560 f)	84	140 f)	350 f)	12
JP	:	:	:	40 000 b)	:	79	1 420 f)	3 120 f)	6
US	100 800 j)	102 200 j)	98	88 120 j)	96 200 j)	94	13 000 e)	24 800 e)	24

Source: Eurostat Auvis database

a) Eurostat estimate based on extrapolation of Screen

Digest/IVF data where Eurostat data are not available

b) Source: Screen Digest/IVF

c) Source: Finnpanel

d) British Video Association

e) Source: MPAA

f) Source: EAO

g) Source: SES/ASTRA

h) Eurostat estimate based on EAO data

i) Source: MMS (Mediemätningar I Skandinavien AB)

j) Source: Nielson Media Research

With a 97% share of EU-15 private households with TV sets in 2001, the penetration rate has reached an upper limit. The potential for growth lies in the actual number of households and the upgrading of newer TV sets (wide-screen, plasma-screen, etc).

The VCR market became saturated during the 1990s, with little change in penetration rates from 1995

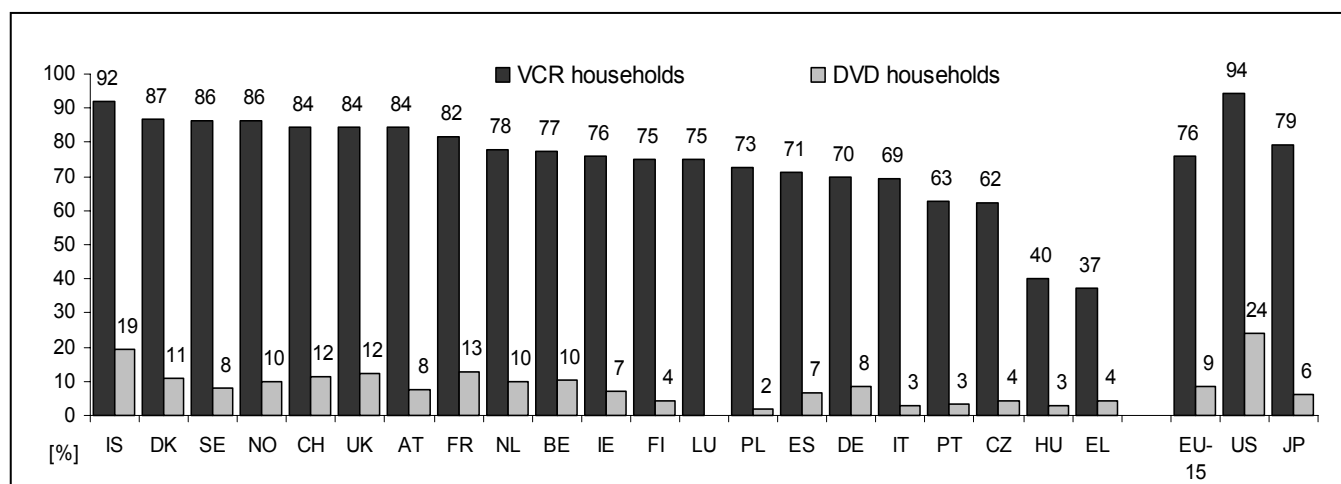
onwards. Nearly 76% of EU TV households were equipped with a video player in 2001.

DVD players are at the beginning of their product life-cycle, with the EU penetration rate reaching 9% in 2001. In that year, the highest penetration rates were recorded in Iceland (19.2%), France (12.6%) and the UK (12.3%). Nevertheless, the US was the largest DVD market

by the end of 2001, with an installed base of 25 million players (24%). The number of DVD households in the US rose to 39 million in 2002.

The number of DVD households in the EU increased from 4.6 million in 2000 to 12.9 million in 2001. The United Kingdom, France and Germany, each with approximately three million DVD players, account for 70% of the EU-15 stock.

Figure 2: Share of households owning a VCR and DVD, 2001



Source: See footnotes to Table 1

Turnover and per capita spending on DVDs

Table 2: Turnover from DVD sales and rentals in 2000 and 2001

	DVD sales			Average consumer price (euro)	DVD rental			Average rental charge (euro)
	(million euro)	(euro per capita)			(million euro)	(euro per capita)		
	2000	2001	2001		2000	2001	2001	
EU-15	1 306.3	2 864.1	7.6	24.3	85.4	277.0	0.7	3.4
BE a)	62.6	116.6	11.4	23.4	5.6	14.6	1.4	3.0
DK a)	17.4	35.4	6.6	20.0	1.8	7.8	1.5	4.0
DE	170.4	406.7	4.9	21.5	12.6	40.6	0.5	2.4
EL a)	2.7	2.6	0.2	26.0	3.6	5.0	0.5	1.5
ES a)	68.5	132.5	3.3	21.0	1.0	9.8	0.2	2.2
FR a)	371.6	763.7	12.9	28.9	8.1	31.4	0.5	3.4
IE c)	6.3	13.9	3.6	21.4	0.8	1.6	0.4	2.7
IT	72.3	118.8	2.1	21.2	1.1 a)	12.9	0.2	4.1
LU	:	:	:	:	:	:	:	:
NL	53.1	116.9 a)	7.3	24.0	8.2	26.5 a)	1.7	3.2
AT c)	9.4	29.3	3.6	21.7	1.3	4.8	0.6	2.8
PT	3.8	11.9	1.2	22.3	0.3	0.9	0.1	2.2
FI b)	10.4	24.5	4.7	20.4	1.3	4.5	0.9	2.2
SE a)	24.6	52.5	5.9	18.8	3.7	12.1	1.4	4.3
UK	433.2	1 038.8	17.4	25.2	36.1	104.5	1.7	4.3
CZ c)	3.5	7.3	0.7	23.5	0.5	1.3	0.1	1.4
HU a)	2.5	8.5	0.8	23.6	0.3	0.5	0.0	1.9
PL a)	8.2	21.0	0.5	16.7	0.9	2.8	0.1	2.5
IS	2.1	2.8	9.9	28.9	0.2	0.6	1.9	:
NO	6.5 a)	19.0 a)	4.2	14.6	1.8	22.4	5.0	5.6
CH c)	56.4	109.2	15.2	26.6	2.7	8.7	1.2	:
JP	:	:	:	:	:	:	:	:
US a)	3 493.9	6 010.3	21.1	20.4	742.7	1 851.2	6.5	3.5

Source: Eurostat Auvis database

a) Source: Screen Digest/IVF

b) Source: Finnish Film Distributors Association

c) Source: EAO

EU DVD sales turnover was estimated at 2.9 billion euro in 2001 representing, on average, approximately 7.6 euro per inhabitant. Revenue increased by 119% compared with 2000, confirming the growth potential of this new technology. Three countries, namely the United Kingdom, France and Germany, accounted for three-quarters of sales turnover.

EU turnover from DVD rentals was

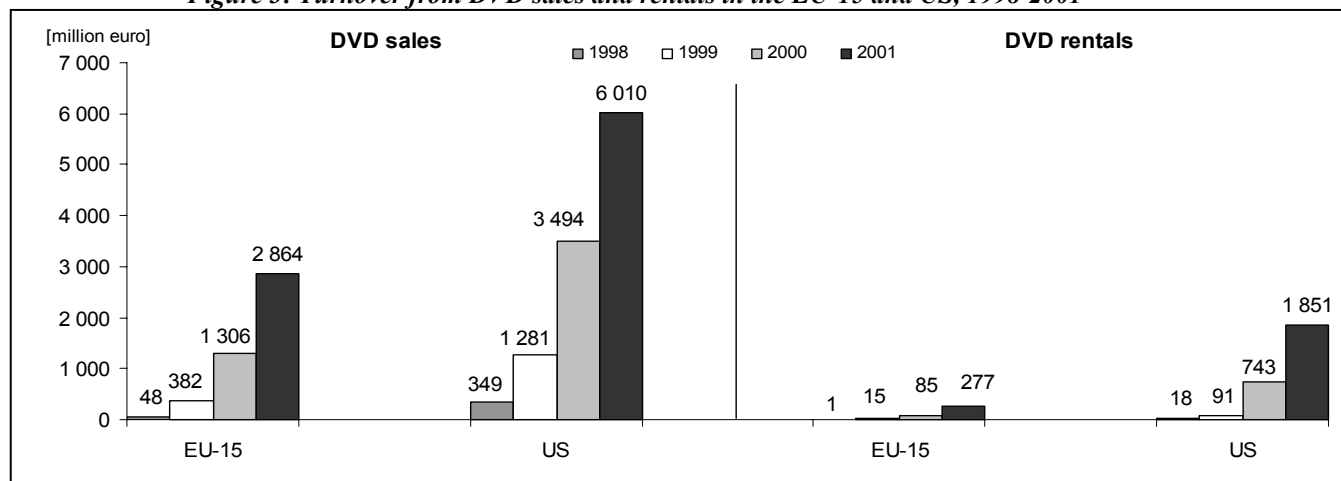
estimated at 0.3 billion euro in 2001. Revenue from DVD rentals rose by 224%. The popularity of DVDs also increased because of the extras they contain, for example director's cuts and commentaries, outtakes, interviews and behind-the-scenes footage.

In 2001, the EU-15 average DVD consumer price was 24 euro. At 20 euro, the average US sales price was 17% lower than the EU-15 figure.

The average DVD rental charge of 3.4 euro in EU-15 was slightly lower than the US charge (3.5 euro).

Video and DVD income is very important to film studios because it often accounts for more than half of a film's overall revenue. In 2001, total revenue from films (cinema + VHS + DVD) was worth 14 billion euro, of which 41% was attributable to VHS, 37% to cinema showing and 22% to DVD.

Figure 3: Turnover from DVD sales and rentals in the EU-15 and US, 1998-2001



Source: See footnotes to Table 2

DVD unit sales and rentals

Table 3: Number of DVDs sold and rented in 2000 and 2001

	DVD sales			Number of titles for sale	DVD rentals			Number of titles for rental
	(1 000)		(per DVD household)		(1 000)		(per DVD household)	
	2000	2001	2001		2000	2001	2001	
EU-15	52 084	118 020	9.2	1 830	34 711	81 200	6.3	1 562
BE a)	2 553	4 980	11.7	2 220	1 871	4 900	11.5	678
DK	898 a)	1 770 a)	6.8	700 a)	442	1 900	7.3	700 a)
DE	8 200	18 900	6.0	2 200 a)	5 200	15 000	4.8	4 400 a)
EL a)	100	100	0.6	750 f)	2 400	3 400	21.3	750 f)
ES	3 000 a)	6 300 a)	7.4	978	500 a)	4 500 a)	5.3	978 a)
FR	12 500	26 400 a)	9.1	2 100 a)	2 360	9 400 a)	3.3	2 114
IE	260 a)	650 a)	7.2	2 970 f)	289 a)	1 700 a)	18.9	2 790
IT	3 300	5 600	9.3	750	500	1 900	3.1	800 a)
LU	.	.	.	.	.	.	.	.
NL	1 900	4 880 a)	7.3	2 500 a)	3 000	8 300 a)	12.4	2 500 a)
AT a)	420	1 350	5.4	.	464	1 700	6.8	.
PT b)	662	1 797	18.0	624 f)	165	400	4.0	624 f)
FI c)	500	1 200	12.6	4 400 f)	260	1 000	10.5	400 f)
SE	1 191	2 793	8.8	600 a)	660	2 100	6.6	600 a)
UK	16 600 e)	41 300 e)	13.8	3 000	16 600 e)	25 000 e)	8.3	2 970 a)
CZ f)	150	310	1.8	2 200	360	920	5.4	338
HU f)	110	360	3.7	600 a)	150	280	2.9	600 a)
PL f)	450	1 260	6.3	700 a)	410	1 160	5.8	700 a)
IS	69 d)	97 d)	5.1	441	52 d)	130 d)	6.8	254
NO	300 a)	1 300 a)	6.8	744	320 a)	2 880 a)	15.1	399
CH f)	2 110	4 110	11.7	1 500	710	2 320	6.6	.
JP	.	.	.	.	.	.	.	.
US a)	147 000	294 000	11.9	13 000	202 000	535 000	21.6	.

Source: Eurostat Auvis database

a) Source: Screen

Digest/IVF

b) Source: IGAC

c) Source: Film

Distributors'

Association

d) Number of DVD sold

and rented: Number of

copies shipped from

distributors to retail.

e) Source: British Video

Association

f) Source: EAO

In 2001, EU-15 households bought 118 million discs. EU-15 DVD households seem keener to buy DVDs (9.2 per DVD household) than VCR households are to buy video cassettes (only 2.4 per VCR household), even though the average DVD is nearly twice as expensive as the average video cassette (24 as against 13 euro).

At 41.3 million, the UK had the highest DVD sales in 2001 (nearly 25 million more than in 2000).

Among the EU Member States, Portuguese, British, and Finnish residents buy most DVDs per DVD household (18, 14 and 13 respectively).

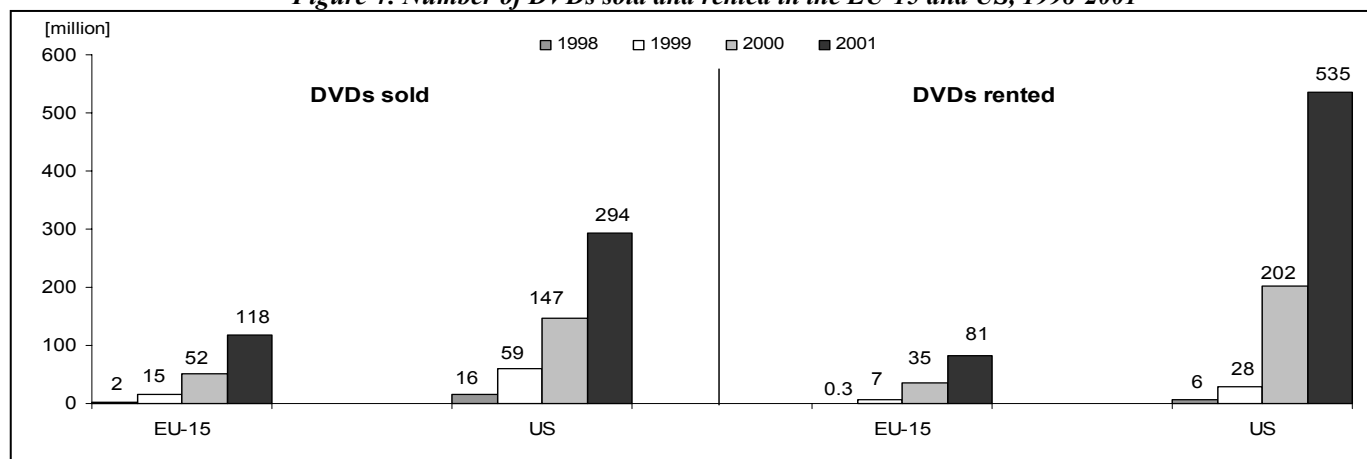
EU-15 households rented 81 million DVDs in 2001. EU-15 DVD households rented an average of 6.3 DVD films in 2001, while VCR owners rented some 5.7 VHS films. The European market shows different consumption preferences; thus, whilst Italian, Portuguese and

French residents buy, Greek, Irish and Dutch residents rent DVDs.

The average number of titles released for DVD sale per EU country (1 830 titles) has increased substantially to the point where it has now overtaken video cassette releases (approximately 1 250 titles).

The average number of titles released for rental was much higher on DVD (1 562 titles) than on video (634 titles).

Figure 4: Number of DVDs sold and rented in the EU-15 and US, 1998-2001



Source: See footnotes to Table 3

Turnover and per capita spending on video cassettes

Table 4: Turnover from video cassette sales and rentals in 2000 and 2001

	Video cassette sales			Average consumer price (euro)	Video cassette rentals			Average rental charge (euro)
	(million euro)		(euro per capita)		(million euro)		(euro per capita)	
	2000	2001	2001		2000	2001	2001	
EU-15 a)	3 840.0	3 583.0	9.5	13.0	2 121.6	2 126.0	5.6	3.3
BE	75.1 b)	69.0 b)	6.7	11.9	67.9 b)	58.0 b)	5.7	3.0
DK	83.7 b)	95.0 b)	17.8	12.8	70.0 b)	65.0 b)	12.2	3.6
DE	424.0	384.0	4.7	12.1	340.0	356.0	4.3	3.0
EL	8.7 b)	8.6 b)	0.8	21.5	11.2 b)	22.8 b)	2.2	1.5
ES	166.1 b)	127.0 b)	3.2	9.8	186.0 b)	183.0 b)	4.6	2.0
FR	964.0 b)	902.0 b)	15.3	16.5	221.7 b)	208.0 b)	3.5	3.4
IE	30.1 b)	41.2 b)	10.8	16.5	78.6 b)	74.0 b)	19.3	2.8
IT	377.0 c)	310.0 c)	5.4	10.2	167.8	167.4	2.9	3.1
LU g)	3.1	:	7.4	:	1.4	:	3.3	2.3
NL	103.9	82.0 b)	5.1	9.1	104.8	104.0 b)	6.5	3.0
AT	52.3 b)	50.6 b)	6.2	13.3	24.6 b)	23.9 b)	2.9	2.7
PT	31.7 b)	29.7 b)	2.9	12.4	11.9 b)	12.9 b)	1.3	2.4
FI	45.0	42.0	8.1	12.7	25.2 d)	24.0 d)	4.6	2.7
SE	96.3 b)	82.5 b)	9.3	10.5	83.4 b)	79.3 b)	8.9	4.0
UK	1 379.0 a)	1 356.0 a)	22.7	14.5	728.5	747.7	12.5	4.6
CZ	13.3 e)	12.3 e)	1.2	11.2	11.0 e)	11.4 e)	1.1	0.7
HU	11.0	12.7	1.3	9.7	21.5	19.8	2.0	1.4
PL	20.2	20.3	0.5	6.0	11.9	11.4	0.3	1.0
IS	4.6	2.7	9.5	16.9	10.8	10.8	38.3	3.6
NO	55.9 b)	61.2 b)	13.6	13.0	59.9	59.6	13.2	3.7
CH f)	56.9	:	8.0	15.8	23.7	:	3.3	3.8
JP	1 358.9 h)	:	10.8 h)	32.4 g)	2 625.2 h)	:	20.8 h)	3.1 h)
US	5 593.3 b)	5 478.8 b)	19.2	12.8	10 322.5 b)	9 603.3 b)	33.7	3.0

Source: Eurostat Auvis database

a) EU-15 data estimated

b) Source: Screen Digest/IVF

c) Univideo

d) Finnish Film Distributors' Association

e) Source: EAO

f) 1999 data

g) 1997 data

h) 1998 data

In 2001, the value of the EU-15 video market (sales + rentals of pre-recorded video cassettes) was 5.7 billion euro, which is equivalent to only 38% of the US market (15.1 billion euro). The Japanese video market was valued at 4 billion euro in 1998.

Whilst video cassette rentals were to the fore in EU-15 in 1990 (63%), sales have surged ahead since the mid-1990s and now account for two-thirds of turnover. Rentals dominate the US video market with 64% of

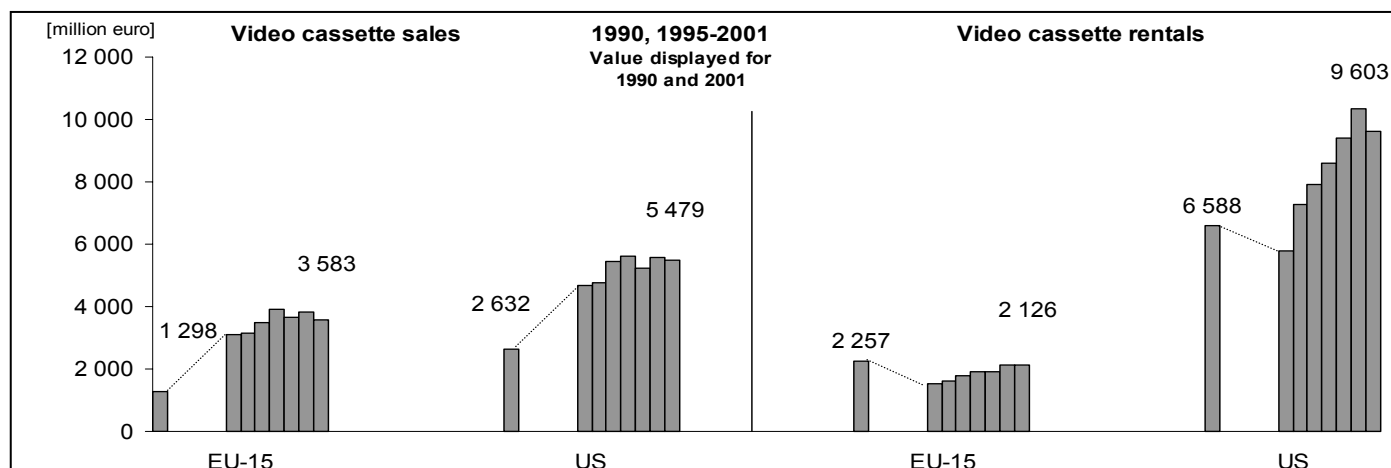
total turnover.

Three Member States, namely the United Kingdom (1.4 billion euro sales, 0.7 billion euro rentals), France (0.9 billion euro sales, 0.2 billion euro rentals) and Germany (0.4 billion euro sales, 0.4 billion euro rentals) accounted for two-thirds of total EU-15 turnover.

A comparison of per capita turnover reveals significant disparities. EU-15 per capita video cassette sales attained a value of 9.5 euro, which

was half the corresponding US figure (19.2 euro) and lower than in Japan (10.8 euro per capita in 1998). Among the EU Member States, only the UK (22.6 euro) exceeds US per capita spending on video cassettes. EU-15 citizens spend about half as much (5.6 euro per capita) on renting as on buying video cassettes. The average American spends more on renting than on buying (34 euro). No other country in this comparison spends more per capita on video rentals than Iceland (38 euro).

Figure 5: Turnover from video cassette sales and rentals in the EU-15 and US, 1990, 1995 - 2001



Source: See footnotes to Table 4

Video cassette unit sales and rentals

Table 5: Number of video cassettes sold and rented in 2000 and 2001

	Video cassette sales			Number of titles for sale	Video cassette rentals			Number of titles for rental
	(million)		(per VCR household)		(million)		(per VCR household)	
	2000	2001	2001		2000	2001	2001	
EU-15 a)	303.7	274.8	2.4	1 248	701.1	647.5	5.7	634
BE	6.3 b)	5.8 b)	1.8	1 570 b)	23.8 b)	19.5 b)	6.1	960 b)
DK	6.6 b)	7.4 b)	3.6	544 b)	20.1 b)	18.1 b)	8.8	948 b)
DE	35.9	31.7	1.2	800 b)	126.0	119.3	4.5	500 b)
EL	0.4 b)	0.4 b)	0.3	:	15.7 e)	15.5 e)	10.5	:
ES	14.0 b)	13.0 b)	1.4	962 b)	89.7 b)	92.4 b)	9.9	483 b)
FR	55.0	54.7	2.9	1 100	67.0	62.0	3.3	500
IE	2.6 b)	2.5 b)	2.7	:	28.8	26.8	28.5	:
IT	36.6 d)	35.8 d)	2.5	1 350 b)	65.0	54.0	3.7	550
LU f)	:	:	:	:	0.6	:	4.8	:
NL	9.5	9.0	1.7	900 b)	37.0	34.9	6.6	550 b)
AT	4.0 b)	3.8 b)	1.4	:	9.1 b)	8.8 b)	3.2	:
PT	7.6 c)	5.8 c)	3.1	:	5.7 b)	5.4 b)	2.8	:
FI	3.6	3.3	1.9	500 g)	9.0	9.0	5.3	:
SE	7.7	7.9	2.2	500 b)	18.2	19.8	5.7	675 b)
UK	114.0	93.7	4.5	4 250	186.0	162.0	7.9	540
CZ e)	1.2	1.1	0.4	:	17.0	16.4	6.7	:
HU	1.2	1.3	0.9	200	16.0	14.5	10.0	300
PL	3.3	3.4	0.4	550	12.0	11.6	1.3	450
IS	0.2	0.2	1.7	:	2.9	3.0	33.0	580
NO	4.2 b)	4.7 b)	2.8	421	18.0 b)	16.0 b)	9.4	609
CH	3.4 e)	3.3 e)	1.3	:	6.5 e)	5.3 e)	2.1	:
JP f)	42.0	:	1.0	:	848.5	:	21.2	:
US	446.0 b)	428.0 b)	4.4	:	3324.0 b)	3221.0 b)	33.5	:

Source: Eurostat Auvis database

a) EU-15 data estimated, based on last known year for countries with no data available

b) Source: Screen Digest/IVF

c) Source: IGAC Estimated by direct

sales of (VHS+CDROM+DVD+LASER DISK)

d) Univideo

e) EAO

f) 1998 data

g) Source: Film

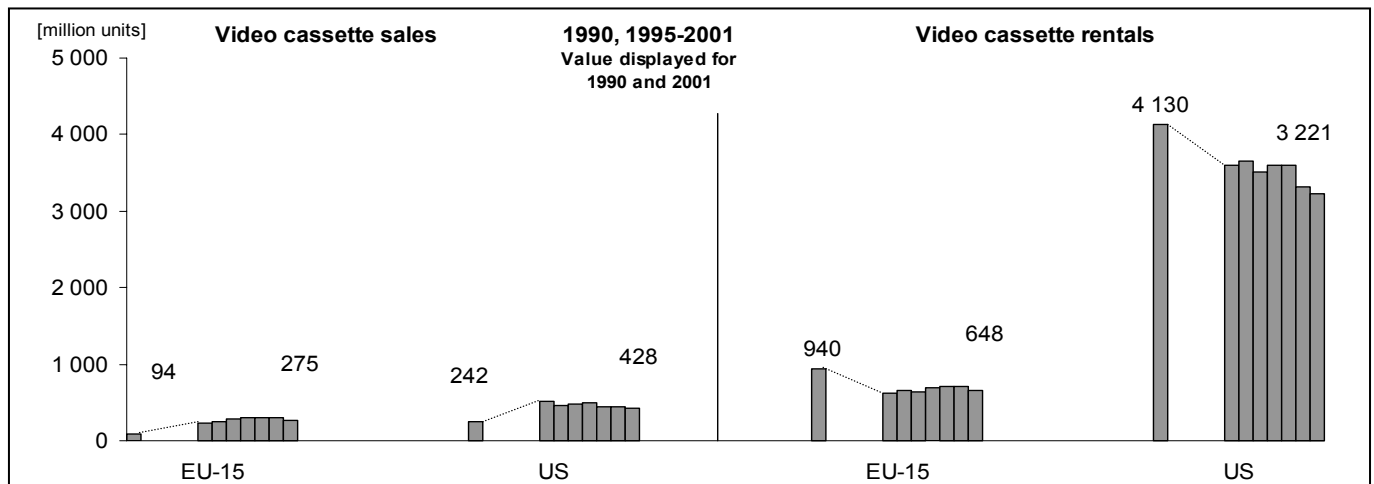
Distributors' Association

In 2001, the average sale price of a video cassette in the EU was 13.0 euro. The corresponding Japanese figure was much higher 32.4 euro, (1997 data), and this may explain the relatively low sales figures. At 12.8 euro, the average US sales price was nearly the same as the average EU-15 price. The average video cassette rental price in EU-15 was 8% higher than in the United States (3.3 as against 3.0 euro).

Nearly 275 million video cassettes were sold in EU-15 in 2001, with the UK accounting for 94 million (34%). British video sales per VCR household (4.5 cassettes) were nearly the same as in America (4.4). Average EU-15 purchases were just 2.4 cassettes per VCR household. The number of video cassettes sold decreased by 9.5% compared with the previous year.

In 2001, 648 million video cassettes were rented in EU-15, a decrease of 7.6% on 2000. Whilst the average EU-15 VCR household rents video cassettes 5.7 times per year, rental is nearly six times as popular in corresponding US households (33.5 times). Among the EU Member States, only Ireland shows high rental levels with 28.5 rentals per video household per year. Video rental, at 33 rentals per year per VCR household, was very popular in Iceland.

Figure 6: Number of video cassettes sold and rented in the EU-15 and US, 1990, 1995 - 2001



Source: See footnotes to Table 5

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTE

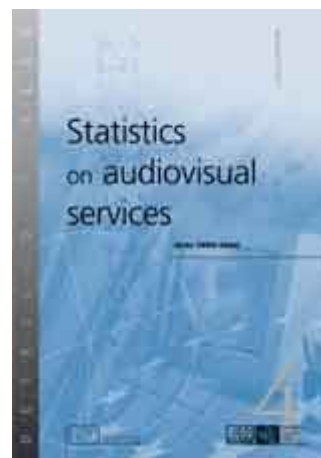
This Statistics in Focus (SiF) is based on annual audiovisual services statistics in the AUVIS domain from Eurostat's reference database New Cronos, Theme 4 Industry, Trade and Services. Some additional data were added using the European Audiovisual Observatory, International Video Federation and Motion Picture Association of America as sources.

EAO	European Audiovisual Observatory; <i>Yearbook 2002</i>
IVF	International Video Federation; <i>The European Video Yearbook 2002/2003</i>
MPAA	Motion Picture Association of America
Number of DVD player households:	Number of private households equipped with at least one DVD player.
Number of VCR households:	Number of private households equipped with at least one videocassette recorder.
DVD sales and rentals:	Retail consumer level spending on DVDs and revenue from DVD rentals.
DVDs sold:	Number of DVDs sold to consumers.
DVDs rented:	Number of DVD rental transactions.
DVD titles released for sale:	Number of titles released for sale during the year. EU-15 figure reflects average per Member State.
DVD titles released for rental:	Number of titles released for rental during the year. EU-15 figure reflects average per Member State.
Symbols	
:	Data not available

Further information: Statistics on audiovisual services (paper or PDF, EN only)

This publication aims to provide comprehensive statistical information on the audiovisual sector in the EU, EFTA and some important non-European OECD countries. The publication includes 150 statistical tables mostly covering the 1980-2000 period and 80 graphs.

- Introduction
- Overview
- 1. Audiovisual services and advertising
- 2. Cinema production and distribution market
- 3. Cinema exhibition market
- 4. Video and DVD market
- 5. Television market
- 6. Cable operating market and satellite market
- 7. Sound recordings market
- 8. Radio market
- 9. Video games market
- Other general information
- Appendix: Definitions



A new version of this publication, entitled "Cinema, TV and Radio in the EU", will be available in autumn 2003.

Further information:

➤ Reference publications

Title Statistics on audiovisual services, data 1980-2000
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➤ Databases

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