

## When Will Blu-Ray Go Black?

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In USA in Q1 2012, according to the Digital Entertainment Group, subscription streaming of movies and TV shows rose up a powerful 545% Y-to-Y, while electronic sell-through showed a healthy 17% increase and video-on-demand growing at 7%.



Spending on physical disc rentals (both Netflix and Blockbuster DVDs by mail, as well as brick and mortar stores in USA) dropped 25% from the same time period in 2011. Kiosk DVD & Blu-ray rentals went up 30%, but brick and mortar dropped almost 40% and subscription rentals nose-dived to 48%.

That all suggests the end of blank and pre-recorded optical media is nigh, along with the players that support the media.

Yet Blu-ray discs sales rose 23 % Y-Y overall. DEG says 2.4M Blu-ray players were sold in USA in Q1 '12 and 2 million new UltraViolet accounts were opened. UltraViolet provides a secure locker for keys to register users to open and view movie/TV files on almost any platform. If your customer buys a Blu-ray disc, they get a key for that DVD to watch it whenever, wherever.

Taken as a whole, we'll be selling Blu-Ray for some time to come. Not forever, but no need to worry for next couple of years. In general, the Digital Entertainment Group reports for Q1 2012 home video spend rose 2.5% year-to-year(\$4.45B). That's the first year-over-year gain in USA two quarters. So, in Europe, when the consumer market lifts, you can still expect Blu-Ray to lift with it.

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