Belgium

Belgium key data 2019

Population (m)	11.5
TV households (m)	4.8
Consumer spending on physical video software (€m)	44.0
Comparison with 2018	-21.8%
Consumer spending on physical video software (€m) - Total Europe	2,356.1
Comparison with 2018	-18.3%
Consumer spending on digital video and TV VoD (€m)	197.1
Comparison with 2018	27.1%

Consumer spending on digital video and TV VoD (€m) - Total Europe	10,947.0
Comparison with 2018	29.4%
Consumer spending on total video (€m)	241.1
Comparison with 2018	14.1%
Consumer spending on total video (€m) - Total Europe	13,303.1
Comparison with 2018	17.2%

Belgium key commentry

Market developments

In 2019, the total Belgian video market (digital and physical) grew by 14.1%, resulting in total consumer spending of EUR 241.1 million on all video content distributed online and on physical carriers.

However, the market for physical discs experienced a decline of 21.8% in value compared to 2018, finishing the year with EUR 44.0 million worth of final total consumer spending for Belgium in 2019.

Digital consumption (digital video and TV VOD) reached total consumer spending of EUR 197.1 million, showing a growth of 27.1% compared with 2018, and going some way towards balancing the decline in the market performance of the physical formats.

Other relevant developments

At the end of 2017, a Belgian court handed down a ground-breaking decision, ordering Belgian ISPs to block access to websites that massively violate copyright by facilitating consumer access to online sites offering illegal access to copyright content. In 2018, BEA, through its content protection programme, started a systematic action to request court blocking decisions against sites which offer illegal access to copyright content. From 2018 until January 2019, close to 80 websites offering illegal access to copyright content have been blocked in Belgium. Unfortunately, the programme was subsequently interrupted due to insufficient funding.

While running, the programme generated ‘three waves’ with the following judgements:

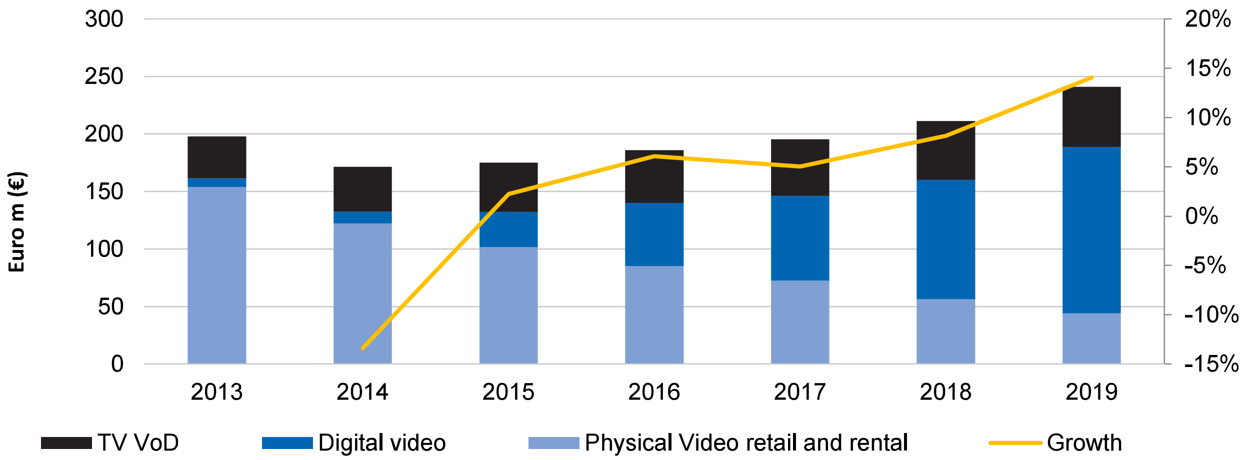
- First blocking wave (450 domains – 33 individual sites) effective on 2/05/2018.
- Second blocking wave (98 domains – 17 individual sites) effective on 29/08/2018.
- Third blocking wave (92 domains – 27 individual sites) effective on 30/01/2019.

The programme turned out to be quite cost-intensive (increased third party reporting costs and legal costs, and there were in sufficient funds for a fourth wave.

In 2019, the members of BEA VIDEO members decided dissolve and liquidate BEA VIDEO asbl. As of 2021, the remaining Belgian Entertainment Association partners will pursue separate structures, staff and resources for music, video games and theatrical distribution.

This commentary was provided by BEA Video, the Belgian Video Federation.

Consumer spending by segment



Source: Omdia

Video market: Belgium

	2013	2014	2015	2016	2017	2018	2019	18/19 %
GENERAL								
Population (m)	11.2	11.2	11.3	11.4	11.4	11.5	11.5	0.5%
TV households (m)	4.6	4.6	4.7	4.7	4.7	4.8	4.8	1.0%
Population Total Europe (m)	624.9	626.1	627.7	629.4	630.9	632.3	633.3	0.2%
TV households Total Europe (m)	255.0	257.3	259.3	261.3	263.2	264.9	266.7	0.7%
Broadband households (m)	3.3	3.5	3.5	3.6	3.7	3.7	3.8	1.0%
Nominal GDP (EUR m)	392.9	403.0	416.7	430.2	446.0	459.5	473.1	2.9%
Consumer price index (100 in 2010)	118.4	118.9	100.0	101.5	105.7	113.3	108.8	-4.0%
DVD Video player/recorder penetration (%)	68.8	64.3	59.1	53.5	47.6	41.9	36.6	-12.7%
Blu-ray Disc player/recorders penetration (%)	20.7	23.4	25.3	25.9	26.2	25.6	24.4	-4.6%
DVD Video player/recorder Total Europe (%)	73.2	71.5	69.4	67.0	64.4	61.7	59.2	-4.1%
Blu-ray Disc player/recorders penetration Total Europe (%)	15.4	18.4	20.7	21.8	22.3	22.3	21.7	-2.6%
OTT Subscriptions (m)	0.1	0.3	0.5	0.7	1.0	1.3	1.9	41.5%

Total video software market

	2013	2014	2015	2016	2017	2018	2019	18/19 %
CONSUMER LEVEL ALL VIDEO								
Total market figures include consumption of both physical and digital video								
Total spending on video (EUR m)	198.0	171.5	175.7	185.9	195.3	211.3	241.1	14.1%
Growth (%)		-13.4%	2.5%	5.8%	5.0%	8.2%	14.1%	
Total spending on video Total Europe (EUR m)	8,453.2	8,499.2	9,142.4	9,229.7	9,830.8	11,346.4	13,303.1	17.2%
CONSUMER LEVEL PHYSICAL VIDEO – TOTAL SPENDING								
Total market figures include consumption of legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.								
Physical video rental (EUR m)	9.6	6.3	4.9	3.6	2.5	1.6	1.0	-35.8%
Physical video rental Total Europe (EUR m)	662.5	517.6	431.4	295.5	214.8	150.2	115.6	-23.0%
Physical video retail (EUR m)	144.4	115.7	96.8	81.7	70.0	54.7	43.0	-21.4%
Physical video retail Total Europe (EUR m)	5,804.8	5,178.1	4,737.7	3,934.4	3,287.6	2,734.8	2,240.4	-18.1%
Physical video software (EUR m)	154.0	122.1	101.7	85.3	72.5	56.3	44.0	-21.8%
Physical video software Total Europe (EUR m)	6,467.3	5,695.7	5,169.1	4,229.9	3,502.5	2,885.0	2,356.1	-18.3%
CONSUMER LEVEL DIGITAL VIDEO (OTT) – TOTAL SPENDING								
The purchase or rental of films and TV series delivered over the open internet. Digital retail numbers include purchase on content on pay TV set-top-boxes where applicable. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.								
Retail digital video (EUR m)	2.7	3.0	3.3	3.8	4.2	4.5	4.6	4.3%
Rental digital video (EUR m)	3.9	4.5	4.9	5.6	6.0	6.5	7.0	6.5%
Subscription digital video (EUR m)	0.9	2.9	22.8	45.2	63.7	93.0	133.0	43.0%
Total digital video (EUR m)	7.5	10.4	31.0	54.6	73.9	104.0	144.6	39.0%
Total digital video Total Europe (EUR m)	1,270.1	2,004.8	3,089.3	4,093.6	5,354.0	7,414.4	9,837.7	32.7%
CONSUMER LEVEL PAY TV TRANSACTIONAL VOD – TOTAL SPENDING								
The rental of film and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services, only on set-top-boxes. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.								
Pay TV TVOD (EUR m)	36.5	39.0	43.0	46.0	49.0	51.1	52.5	2.8%
Pay TV TVOD Total Europe (EUR m)	715.7	798.7	884.0	906.2	974.3	1,047.0	1,109.3	6.0%

*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 Omdia methodology. **3)** The current online figures are a snapshot of the market in March 2020. Figures are updated regularly and so it may not possible to compare directly to figures published after this date. **4)** Total Europe include 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.*

Key players in the market (in alphabetical order)

Physical	Digital
Bol.com	BETV / VOO
Carrefour	Google Play
Cora	iTunes
Fnac	Netflix
Mediamarkt	Proximus
Standaard Boekhandel	Telenet

Share of European market 2019

Physical retail
1.9%

Physical rental
0.9%

Digital video (OTT)
1.5%

Pay TV TVOD
4.7%

Average home entertainment spending

Spending per TV household (EURO)
€50.1

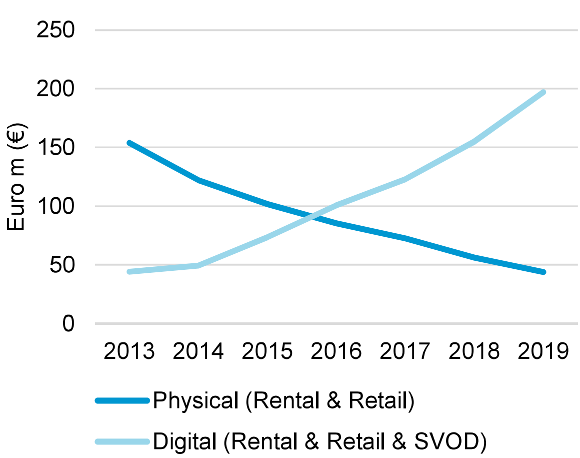
Spending per broadband household (EURO)
€63.8

Digital share of spend vs. broadband speed

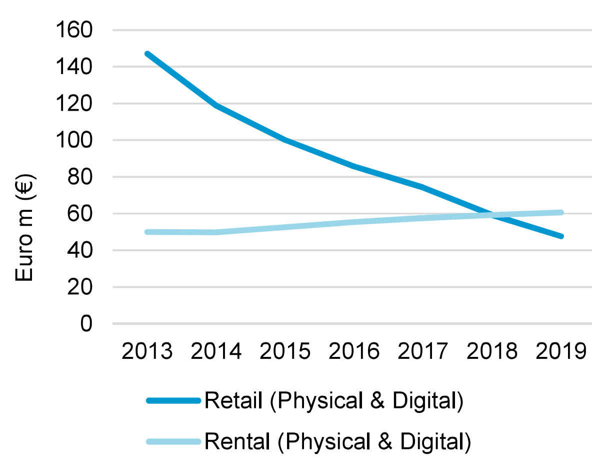
Share digital spend
60%

Broadband connections speed rank
(ranked across the 9 IVF countries)
#2

Comparison Physical vs Digital



Comparison Retail vs Rental



Note: Digital (Rental & Retail) includes SVOD data; Rental (Physical & Digital) excludes SVOD data

Source: Omdia