

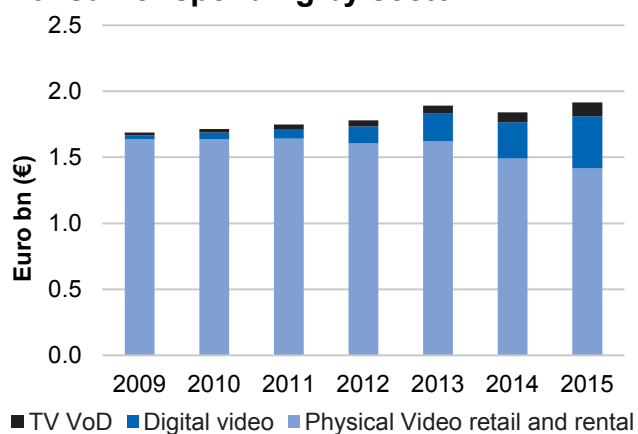
# Germany

## Germany key data

|  |         |
|--|---------|
| Population                                   | 83m     |
| TV households                                | 38.9m   |
| Consumer spending on physical video software | € 1.4bn |
| Comparison with 2014                         | -5.0%   |
| Consumer spending on digital video and TVVoD | € 501m  |
| Comparison with 2014                         | 43.1%   |



## Consumer spending by sector



## Video market: Germany

### Video market: Germany

|   |   | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 14/15 |
|---|---|------|------|------|------|------|------|------|-------|
| <b>General</b>                            |   |      |      |      |      |      |      |      |       |
| Population                                | m | 81.9 | 81.8 | 81.8 | 81.9 | 82.1 | 82.4 | 83.0 | 0.7%  |
| TV households                             | m | 37.4 | 37.8 | 37.2 | 37.6 | 37.9 | 38.6 | 38.9 | 0.8%  |
| DVD Video player/recorder                 | % | 76.1 | 74.7 | 74.4 | 72.6 | 67.3 | 65.6 | 63.2 | -3.6% |
| Blu-ray Disc player/recorders penetration | % | 1.7  | 4.6  | 8.9  | 13.5 | 17.7 | 21.1 | 24.3 | 15.1% |

### Total video software market

|  |        | 2009    | 2010    | 2011    | 2012    | 2013    | 2014    | 2015    | 14/15 |
|--|--------|---------|---------|---------|---------|---------|---------|---------|-------|
| <b>CONSUMER LEVEL ALL VIDEO</b>  |        |         |         |         |         |         |         |         |       |
| <i>Total market figures include consumption of both physical and digital video</i> |        |         |         |         |         |         |         |         |       |
| Total spending on video  | Euro m | 1,686.4 | 1,714.4 | 1,748.9 | 1,779.6 | 1,889.8 | 1,840.4 | 1,916.3 | 4.1%  |

|   |        | 2009    | 2010    | 2011    | 2012    | 2013    | 2014    | 2015    | 14/15 |
|---|--------|---------|---------|---------|---------|---------|---------|---------|-------|
| <b>CONSUMER LEVEL PHYSICAL VIDEO</b>  |        |         |         |         |         |         |         |         |       |
| <i>Total market figures include consumption of legacy formats not broken out separately (eg.VHS, HD-DVD, UMD) where relevant.</i> |        |         |         |         |         |         |         |         |       |
| Total spending on physical video software   | Euro m | 1,635.8 | 1,635.7 | 1,642.0 | 1,605.7 | 1,620.9 | 1,490.4 | 1,415.3 | -5.0% |
| Total spending on physical video retail   | Euro m | 1,376.4 | 1,381.8 | 1,395.0 | 1,362.0 | 1,393.6 | 1,304.5 | 1,248.2 | -4.3% |

|  |        | 2009 | 2010 | 2011 | 2012  | 2013  | 2014  | 2015  | 14/15 |
|--|--------|------|------|------|-------|-------|-------|-------|-------|
| <b>CONSUMER LEVEL DIGITAL VIDEO (OTT)</b>  |        |      |      |      |       |       |       |       |       |
| <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> |        |      |      |      |       |       |       |       |       |
| Total spending on digital video  | Euro m | 28.9 | 51.2 | 71.2 | 126.7 | 208.9 | 274.2 | 395.4 | 44.2% |

|  |        | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015  | 14/15 |
|--|--------|------|------|------|------|------|------|-------|-------|
| <b>CONSUMER LEVEL PAY TV TRANSACTIONAL VOD</b>   |        |      |      |      |      |      |      |       |       |
| <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> |        |      |      |      |      |      |      |       |       |
| Total spending on TV VOD   | Euro m | 21.7 | 27.5 | 35.7 | 47.2 | 60.1 | 75.8 | 105.7 | 39.3% |

Note 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.

Note 2: Historical numbers in this section may differ from those published in previous years owing to changes in IHS methodology.

Note 3: The current online figures are a snapshot of the market in May 2016. Figures are updated regularly and so it may not be possible to compare directly to figures published after this date.

Source: IHS