Germany

Germany key data 2019

Population (m)	83.5
TV households (m)	40.5
Consumer spending on physical video software (€m)	781.4
Comparison with 2018	-14.0%
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)	2,136.7
Comparison with 2018	40.7%

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)	2,918.2
Comparison with 2018	20.2%
Consumer spending on total video (€m) - Total Europe	13,303.1
Comparison with 2018	17.2%

Germany key commentary

Market developments

In 2019, the German home entertainment market continued its expansion: the total German video market (physical and online) reached its best ever result since the start of the collection of European video market data with a total turnover of well above EUR 2 billion.

The main driver of this result was the strong market performance of online distribution services (EST, TVOD and SVOD) which represent the strongest market segment in the German video market.

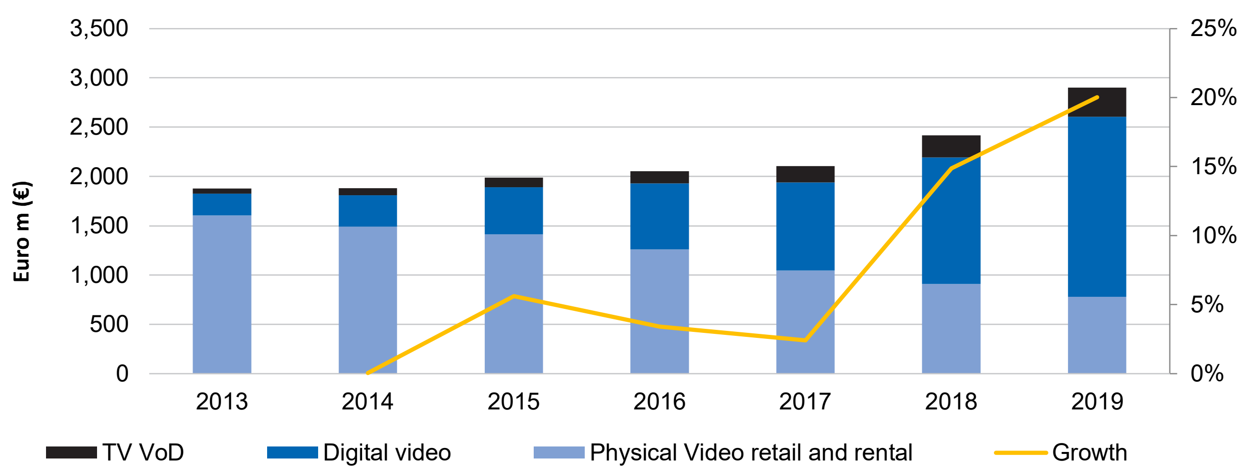
As was already the case in 2018, subscription-based services continued to grow in importance. At the end of 2019, the number of German SVOD subscribers represented 20 % of the population. In addition, EST and TVoD services generally also continue to perform strongly in the German market, with a market share of around 20% in 2019.

For the second time in a row, the German physical market contracted significantly by around 14% compared to 2018.

The best-selling titles on DVD and Blu-ray in 2019 were "**Bohemian Rhapsody**", followed by "**Fantastische Tierwesen: Grindelwalds Verbrechen**" and "**Avengers: Endgame**".

This commentary was provided by the BVV, the German Video Association.

Consumer spending by segment



Source: Omdia

Video market: Germany

	2013	2014	2015	2016	2017	2018	2019	18/19 %
GENERAL								
Population (m)	81.2	81.5	81.8	82.2	82.7	83.1	83.5	0.5%
TV households (m)	38.4	39.1	39.6	39.8	40.1	40.2	40.5	0.8%
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)	25.3	26.2	27.6	29.9	32.2	33.8	35.0	3.4%
Nominal GDP (EUR m)	2,815.7	2,931.7	3,027.0	3,128.4	3,248.7	3,348.9	3,441.0	2.8%
Consumer price index (100 in 2010)	118.0	118.8	100.0	100.1	103.7	110.8	106.5	-3.9%
DVD Video player/recorder penetration (%)	63.6	60.9	57.5	54.6	50.0	46.1	43.0	-6.6%
Blu-ray Disc player/recorders penetration (%)	17.4	20.9	23.9	24.7	24.8	24.2	23.0	-5.2%
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)	0.8	2.9	5.3	8.3	12.4	18.0	24.5	35.7%

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)	1,879.5	1,880.6	1,987.3	2,058.0	2,108.6	2,427.1	2,918.2	20.2%
Growth (%)		0.1%	5.7%	3.6%	2.5%	15.1%	20.2%	
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)	210.4	188.6	165.0	104.7	72.4	48.5	41.3	-14.9%
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)	1,393.6	1,304.5	1,248.2	1,153.0	974.0	860.5	740.2	-14.0%
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)	1,604.0	1,493.1	1,413.2	1,257.7	1,046.4	908.9	781.4	-14.0%
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)	80.8	102.0	110.4	119.7	132.7	146.4	160.7	9.8%
Rental digital video (EUR m)	80.8	105.3	123.7	134.5	142.8	151.6	160.9	6.2%
Subscription digital video (EUR m)	57.9	108.9	243.4	421.1	620.9	993.6	1,522.3	53.2%
Total digital video (EUR m)	219.5	316.1	477.5	675.4	896.4	1,291.6	1,844.0	42.8%
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)	56.1	71.4	96.6	124.9	165.8	226.6	292.8	29.2%
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.*

Source: Omdia

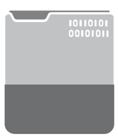
Key players in the market (in alphabetical order)

Physical	Digital
Amazon	Amazon (transactional + subscriptional)
Media Markt	iTunes (transactional + subscriptional)
Müller Drugstores	Maxdome (transactional + subscriptional)
Saturn	Netflix (subscriptional)
Thalia	Sky (transactional + subscriptional)

Share of European market 2019

Physical retail
33.0%

Physical rental
35.7%



Digital video (OTT)
18.8%

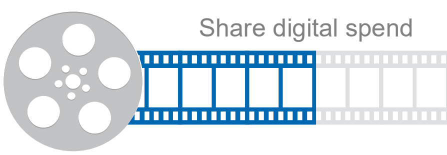
Pay TV TVOD
26.4%

Average home entertainment spending

Spending per TV household (EURO)
€71.5

Spending per broadband household (EURO)
€82.9

Digital share of spend vs. broadband speed



Share digital spend
63%

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

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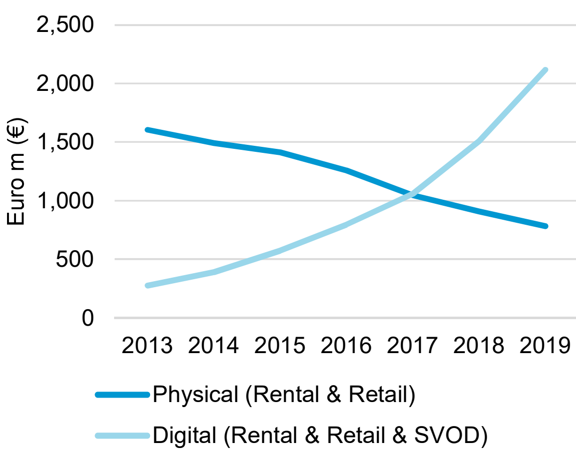
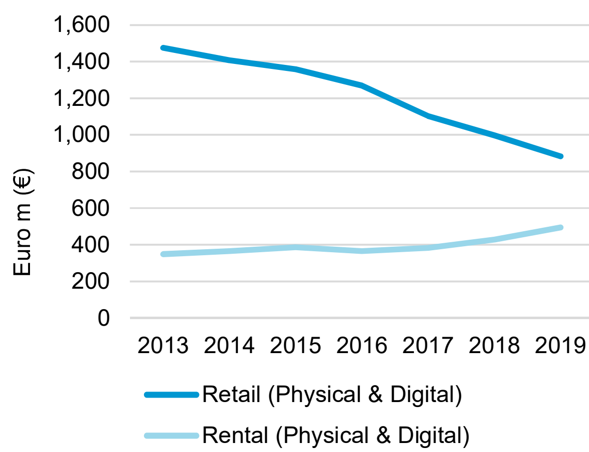
Comparison Physical vs Digital



Comparison Retail vs Rental



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

Source: Omdia