Germany

Germany key data 2020

Population (m)	83.8
TV households (m)	40.8
Consumer spending on physical video software (€m)	672.4
Comparison with 2019	-13.9%
Consumer spending on physical video software (€m) - Total Europe	1,931.1
Comparison with 2019	-17.9%
Consumer spending on digital video and TV VoD (€m)	3,094.2
Comparison with 2019	44.4%

Consumer spending on digital video and TV VoD (€m) - Total Europe	15,714.0
Comparison with 2019	41.3%
Consumer spending on total video (€m)	3,766.6
Comparison with 2019	28.8%
Consumer spending on total video (€m) - Total Europe	17,645.1
Comparison with 2019	31.0%

Germany key commentary

Market developments

In 2020, the German market for copyright works was strongly affected by the global COVID-19 pandemic; German consumers spending on various forms of copyright media content and services (TV, radio, streaming services and books) showed a double-digit growth.

Despite several periods of lockdown and the absence or reduction of new title releases, the German home entertainment market hit its highest turnover ever of above EUR 3.7 billion in consumer spending. The increase was driven by the strong performance of online distribution services, especially SVOD services, showing an increase of consumer spending by 44% and more than 11 million additional subscriptions in 2020 compared to 2019). Furthermore, “Silver Streamers” (population of 60 years and older) and the launch of new services/platforms such as Disney+ impacted growth in the German market together with strong performance by services/platforms such as Netflix, Amazon Prime and Sky.

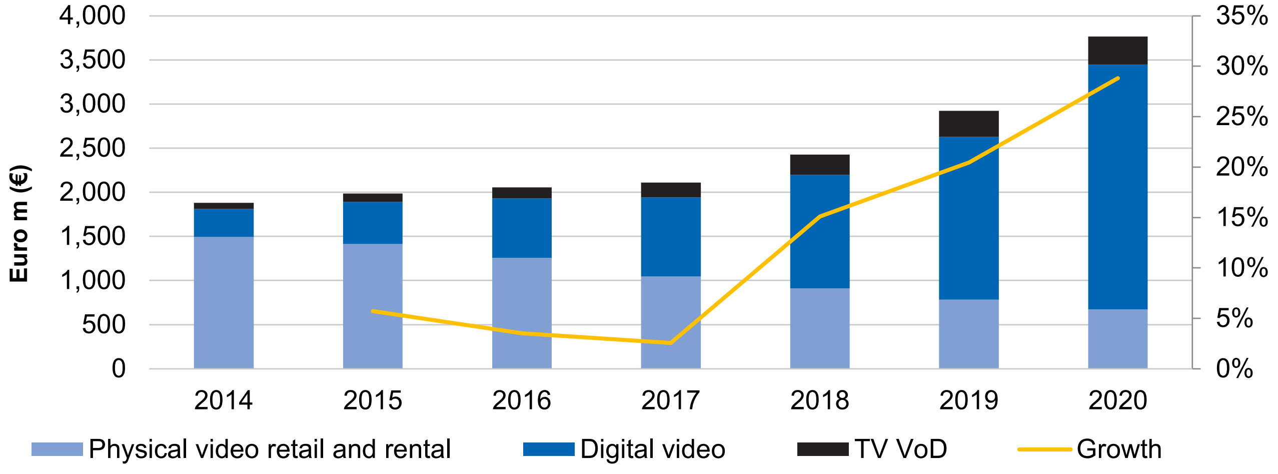
In addition, EST and TVOD services reached the highest level ever with consumer spending of almost EUR 0.4 billion.

The German physical market continued to contract, representing a market share of 18% in 2020, and a decline in consumer spending by 14%, also due to the absence of new film title releases (-32%). Nevertheless, in 2020 German consumers spent 5% more on catalogue titles, especially box sets, and one third of all German consumers still purchase DVDs/Blu Rays.

The best-selling titles on DVD and Blu Ray in 2020 were “Frozen 2” followed by “Star Wars – The Rise of Skywalker” and “Joker”

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

Consumer spending by segment



Source: Omdia

Video market: Germany

	2014	2015	2016	2017	2018	2019	2020	19/20 %
GENERAL								
Population (m)	81.5	81.8	82.2	82.7	83.1	83.5	83.8	0.3%
TV households (m)	39.1	39.6	39.8	40.1	40.2	40.5	40.8	0.6%
Population Total Europe (m)	627.7	629.4	631.1	632.9	634.5	635.9	636.9	0.2%
TV households Total Europe (m)	256.5	258.6	260.2	262.1	263.8	265.7	267.6	0.7%
Broadband households (m)	27.0	28.0	28.4	29.6	30.5	31.1	32.4	4.2%
Nominal GDP (EUR m)	2,931.5	3,022.9	3,128.7	3,263.3	3,360.8	3,454.7	3,319.2	-3.9%
Consumer price index (100 in 2010)	118.8	100.0	100.1	103.7	110.8	106.5	108.3	1.7%
DVD Video player/recorder penetration (%)	60.9	57.5	54.6	50.0	46.1	43.0	40.5	-5.9%
Blu-ray Disc player/recorders penetration (%)	20.9	23.9	24.7	24.8	24.2	23.0	21.8	-5.0%
DVD Video player/recorder Total Europe (%)	71.6	69.4	67.0	64.4	61.7	59.2	56.9	-3.9%
Blu-ray Disc player/recorders penetration Total Europe (%)	18.4	20.7	21.8	22.3	22.3	21.7	21.0	-3.3%
OTT Subscriptions (m)	2.9	5.3	8.3	12.6	18.2	24.9	36.1	45.3%

Total video software market

	2014	2015	2016	2017	2018	2019	2020	19/20 %

CONSUMER LEVEL ALL VIDEO

Total market figures include consumption of both physical and digital video.

	2014	2015	2016	2017	2018	2019	2020	19/20 %
Total spending on video (EUR m)	1,879.4	1,986.8	2,056.7	2,109.2	2,427.8	2,924.3	3,766.6	28.8%
Growth (%)		5.7%	3.5%	2.6%	15.1%	20.5%	28.8%	
Total spending on video Total Europe (EUR m)	8,519.2	9,170.6	9,285.6	9,907.9	11,421.4	13,471.6	17,645.1	31.0%

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.

	2014	2015	2016	2017	2018	2019	2020	19/20 %
Physical video rental (EUR m)	188.6	165.0	104.7	72.4	48.5	41.3	30.6	-25.8%
Physical video rental Total Europe (EUR m)	517.6	431.4	295.5	207.5	145.2	109.8	75.0	-31.7%
Physical video retail (EUR m)	1,304.5	1,248.2	1,153.0	974.0	860.5	739.9	641.8	-13.3%
Physical video retail Total Europe (EUR m)	5,178.1	4,737.7	3,934.4	3,287.6	2,734.8	2,241.8	1,856.1	-17.2%
Physical video software (EUR m)	1,493.1	1,413.2	1,257.7	1,046.4	908.9	781.2	672.4	-13.9%
Physical video software Total Europe (EUR m)	5,695.7	5,169.1	4,229.9	3,495.1	2,880.0	2,351.5	1,931.1	-17.9%

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.

	2014	2015	2016	2017	2018	2019	2020	19/20 %
Retail digital video (EUR m)	102.0	109.9	117.8	130.2	140.7	150.8	166.9	10.7%
Rental digital video (EUR m)	105.3	123.7	134.5	142.7	151.5	160.8	212.5	32.1%
Subscription digital video (EUR m)	108.9	243.4	421.6	623.6	997.6	1,534.7	2,397.2	56.2%
Total digital video (EUR m)	316.1	477.0	673.9	896.4	1,289.8	1,846.4	2,776.6	50.4%
Total digital video Total Europe (EUR m)	2,005.7	3,093.6	4,105.6	5,376.5	7,427.7	9,941.6	14,501.4	45.9%

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.

	2014	2015	2016	2017	2018	2019	2020	19/20 %
Pay TV TVOD (EUR m)	70.1	96.7	125.0	166.3	229.0	296.8	317.6	7.0%
Pay TV TVOD Total Europe (EUR m)	817.8	907.9	950.0	1,036.3	1,113.7	1,178.5	1,212.6	2.9%

*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)
Müller Drugstores	Maxdome (transactional + subscriptional)
Saturn	Netflix (subscriptional)
Thalia	Sky (transactional + subscriptional)

Share of European market 2020

Physical retail
34.6%

Physical rental
40.8%

Digital video (OTT)
19.1%

Pay TV TVOD
26.2%

Average home entertainment spending

Spending per TV household (EURO)
€92.4

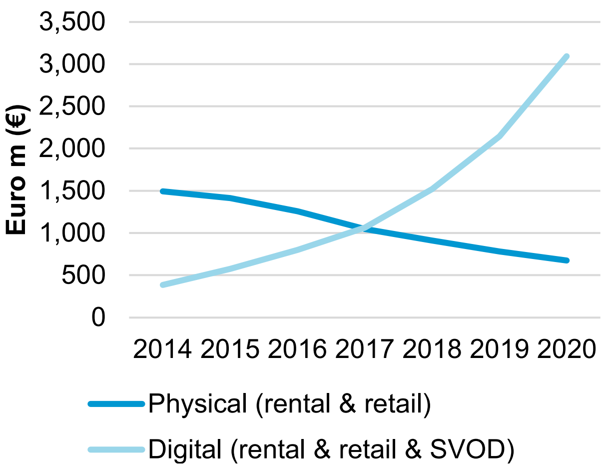
Spending per broadband household (EURO)
€116.4

Digital share of spend vs. broadband speed

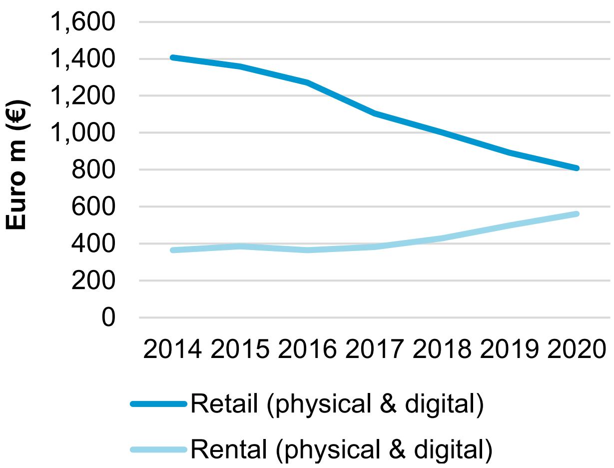
Share digital spend
74%

Broadband connections speed rank
(ranked across the 9 IVF countries)
#8

Comparison physical vs digital



Comparison retail vs rental



Note: Digital (rental & retail) includes SVOD data; Rental (physical & digital) excludes SVOD data

Source: Omdia