

Belgium

Belgium key data 2018

Population (m)	11.5	Consumer spending on digital video and TV VoD (EUR m) - Total Europe	8,785.6
TV households (m)	4.6	Comparison with 2017	30.9%
Consumer spending on physical video software (EUR m)	57.0	Consumer spending on total video (EURm)	227.0
Comparison with 2017	-19.7%	Comparison with 2017	9.1%
Consumer spending on physical video software (EUR m) - Total Europe	2,970.0	Consumer spending on total video (EUR m) - Total Europe	11,755.7
Comparison with 2017	-15.8%	Comparison with 2017	14.8%
Consumer spending on digital video and TV VoD (EUR m)	170.0		
Comparison with 2017	24.0%		

Market developments

In 2018, the total Belgian video market (digital and physical) grew by 9,1%, resulting in EUR 227 million in total consumer spending on all video content distributed online and on physical carriers.

Digital consumption (digital video transactions and TV VOD) reached a total consumer spending of EUR 170 million, showing an important growth of 24% compared with 2017.

Physical video sales (DVD and Blu-ray) declined by 19,7% compared to 2017, resulting in EUR 57,0 million worth of final total consumer spending for Belgium in 2018.

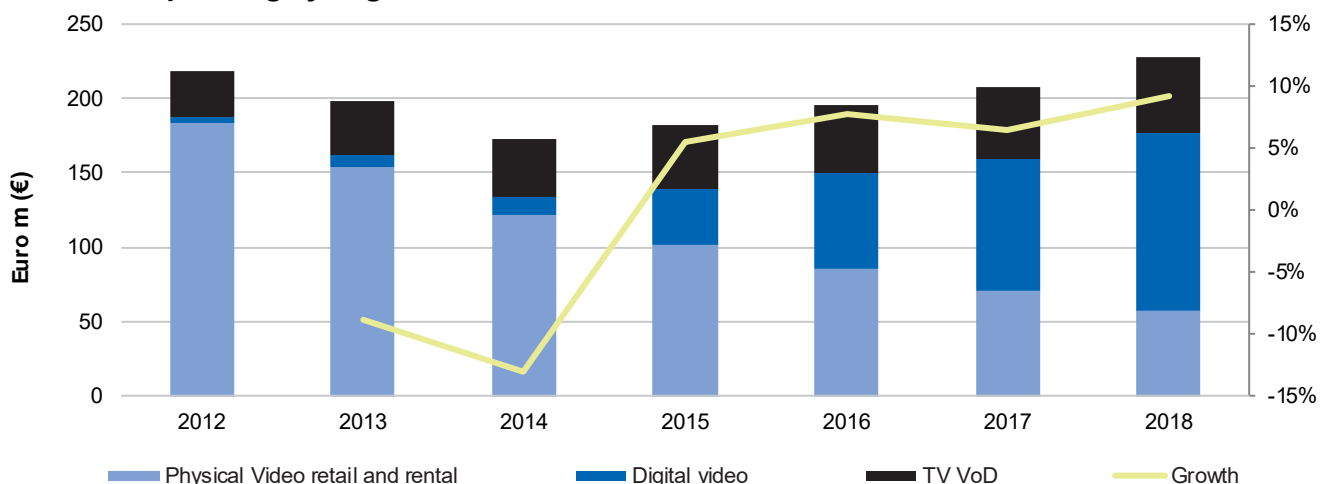
In 2018, the total online consumption was again, as in 2017, three times higher than consumer spending on physical formats.

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. So far close up to 100 websites offering illegal access to copyright content have been blocked in Belgium.

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

Consumer spending by segment



Video market: Belgium	2012	2013	2014	2015	2016	2017	2018	17/18 %
GENERAL								
Population (m)	11.1	11.2	11.2	11.3	11.4	11.4	11.5	0.6%
TV households (m)	4.5	4.5	4.5	4.5	4.6	4.6	4.6	0.7%
Population Total Europe (m)	623.8	624.9	626.1	627.7	629.4	630.9	632.3	0.2%
TV households Total Europe (m)	253.2	255.0	257.3	259.3	261.3	263.2	264.9	0.7%
Broadband households (m)	3.2	3.3	3.5	3.5	3.6	3.7	3.7	1.2%
Nominal GDP (EUR m)	387.5	392.3	400.1	410.3	422.7	437.2	450.2	3.0%
Consumer price index (100 in 2010)	102.9	107.7	108.1	90.9	92.3	96.1	102.9	7.0%
DVD Video player/recorder (%)	75.4	72.6	66.9	60.9	53.9	48.8	43.0	-11.9%
Blu-ray Disc player/recorders penetration (%)	14.4	21.3	24.1	26.1	27.4	26.9	26.3	-2.3%
DVD Video player/recorder Total Europe (%)	76.1	73.8	71.7	69.2	66.8	64.2	61.5	-4.2%
Blu-ray Disc player/recorders penetration Total Europe (%)	11.2	15.4	18.4	20.7	21.7	22.3	22.2	-0.3%
OTT Subscriptions (m)	0.0	0.0	0.2	0.4	0.6	0.8	1.1	33.1%

Total video software market	2012	2013	2014	2015	2016	2017	2018	17/18 %
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CONSUMER LEVEL ALL VIDEO

Total market figures include consumption of both physical and digital video

Total spending on video (EUR m)	217.6	198.1	172.3	181.6	195.5	208.1	227.0	9.1%
Growth (%)		-9.0%	-13.0%	5.4%	7.7%	6.4%	9.1%	
Total spending on video Total Europe (EUR m)	8,824.2	8,449.5	8,513.6	9,183.9	9,474.6	10,236.3	11,755.7	14.8%

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)	10.1	9.7	6.3	4.9	3.6	2.5	1.6	-37.1%
Physical video rental Total Europe (EUR m)	865.1	683.1	526.3	430.2	293.1	212.9	152.0	-28.6%
Physical video retail (EUR m)	172.6	144.4	115.7	96.8	81.7	68.5	55.4	-19.0%
Physical video retail Total Europe (EUR m)	6,607.5	5,808.5	5,184.7	4,756.8	3,989.8	3,312.4	2,818.0	-14.9%
Physical video software (EUR m)	182.7	154.1	122.1	101.7	85.3	70.9	57.0	-19.6%
Physical video software Total Europe (EUR m)	7,472.6	6,491.6	5,711.0	5,187.0	4,282.9	3,525.3	2,970.0	-15.8%

CONSUMER LEVEL DIGITAL VIDEO (OTT) – TOTAL SPENDING

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.

Retail digital video (EUR m)	2.5	2.7	3.0	3.3	3.8	4.2	4.4	6.1%
Rental digital video (EUR m)	1.9	3.9	4.4	4.5	5.5	6.1	6.5	6.0%
Subscription digital video (EUR m)	0.5	0.9	3.8	29.1	54.8	77.9	108.0	38.7%
Total digital video (EUR m)	4.9	7.5	11.3	36.9	64.2	88.1	118.9	34.9%
Total digital video Total Europe (EUR m)	716.9	1,255.7	2,021.0	3,127.8	4,287.2	5,719.6	7,737.1	35.3%

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. 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.

Pay TV TVOD (EUR m)	30.0	36.5	39.0	43.0	46.0	49.0	51.1	4.2%
Pay TV TVOD Total Europe (EUR m)	634.8	702.1	781.5	869.0	904.6	991.6	1,048.5	5.7%

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 IHS Markit methodology. 3) The current online figures are a snapshot of the market in March 2019. Figures are updated regularly and so it may not be 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

- Bol.com
- Carrefour
- Cora
- Fnac
- Mediamarkt
- Standaard Boekhandel

Digital

- BETV / VOO
- Google Play
- iTunes
- Netflix
- Proximus
- Telenet

Share of European market 2018



Physical retail
2.0%



Physical rental
1.0%



Digital video (OTT)
1.5%



Pay TV TVOD
4.9%

Average home entertainment spending



Spending per TV household (EURO)

€48.9

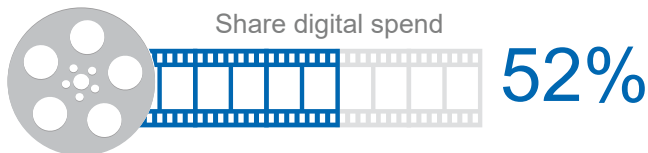


Spending per broadband household (EURO)

€60.7



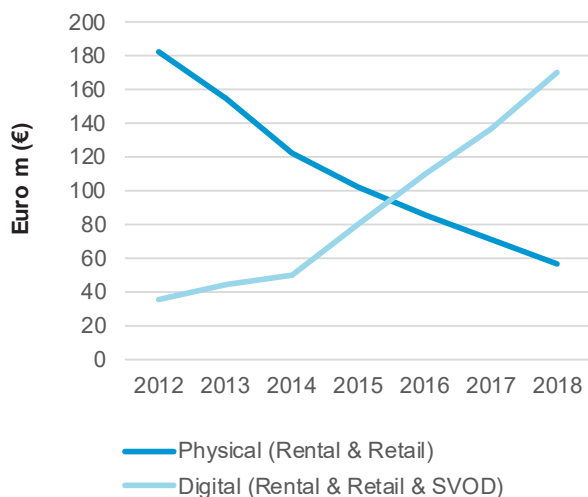
Digital share of spend vs. broadband speed



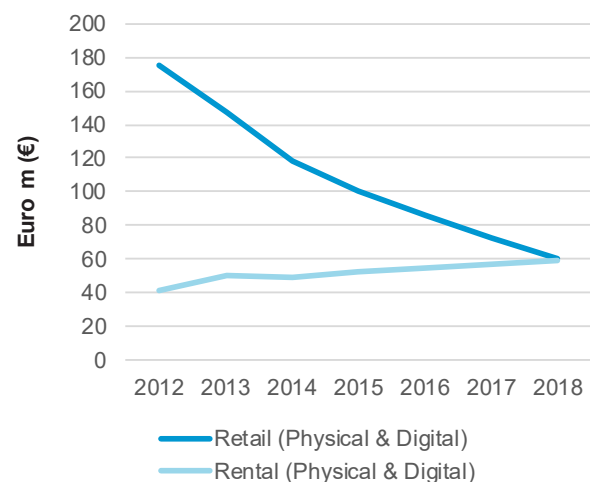
Broadband connections
speed rank
(ranked across the 9 IVF countries)



Comparison Physical vs Digital



Comparison Retail vs Rental



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