France

France key data 2019

Population (m)	65.1
TV households (m)	28.2
Consumer spending on physical video software (€m)	368.5
Comparison with 2018	-18.9%
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)	1,305.2
Comparison with 2018	46.1%

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)	1,673.8
Comparison with 2018	24.2%
Consumer spending on total video (€m) - Total Europe	13,303.1
Comparison with 2018	17.2%

France key commentry

Market developments

The French video market experienced a 24.2% growth in spending on video software (physical carriers and online) in 2019 compared to 2018. The total French video market now represents a value of EUR 1,674 million.

In 2019, the French DVD/Blu-Ray market saw a decline of 18.9% in value compared to 2018, closing at 368.5 million EUR. The decrease of the physical market is due to several factors: the high level of internet piracy in the French market, the broad offer of free TV services and catch up TV offer available to French audiences as well as the shift in consumer preferences towards online services, including subscription-based models.

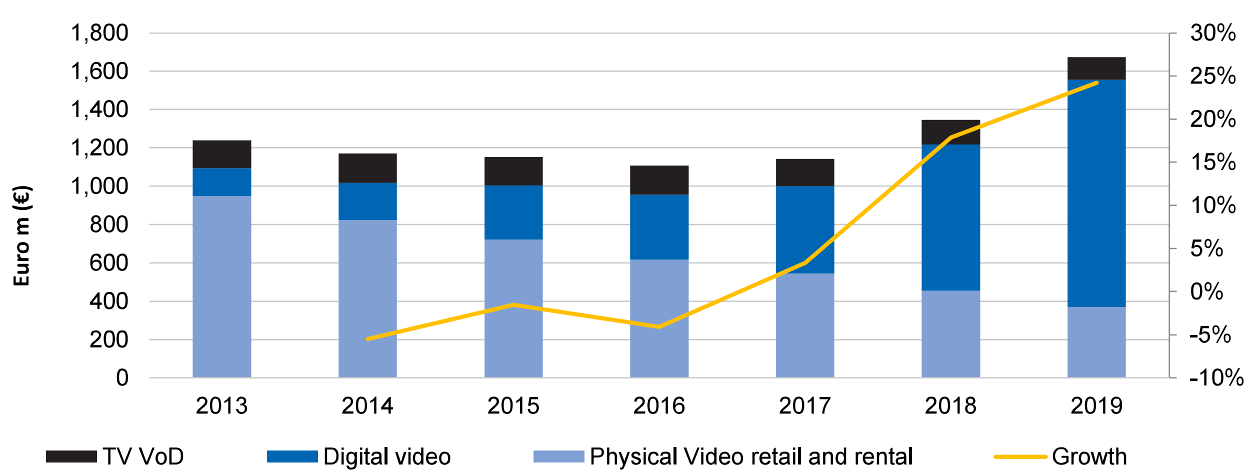
The online market experienced healthy performance in 2019, in particular as regards SVOD services, contributing to offsetting the market performance of the physical formats.

Other relevant developments

Thanks to the success in previous years, the promotional campaign «Fête de la VOD» was repeated in 2019 with a view to increasing consumer awareness about online distribution services and in particular to encourage and keep consumers engaged in the transactional digital market. For the 4th edition of the « Fête de la VOD » campaign, 9 online transactional platforms (Arte VOD, Canal VOD, FilmoTV, VOD My TF1, Orange, Universciné, Vidéofutur, La Cinétek, La Toile) offering a wide range of titles and content for consumers to discover via transactional digital models.

This commentary was provided by SEVN, the French Digital Video Association.

Consumer spending by segment



Source: Omdia

Video market: France

	2013	2014	2015	2016	2017	2018	2019	18/19 %
GENERAL								
Population (m)	63.9	64.2	64.5	64.7	64.8	65.0	65.1	0.2%
TV households (m)	27.0	27.2	27.5	27.7	27.9	28.0	28.2	0.6%
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)	17.7	18.5	19.6	20.4	21.1	21.8	22.1	1.0%
Nominal GDP (EUR m)	2,118.1	2,151.4	2,198.3	2,232.4	2,298.6	2,362.4	2,427.0	2.7%
Consumer price index (100 in 2010)	118.9	119.5	100.0	100.0	103.1	110.3	105.9	-3.9%
DVD Video player/recorder penetration (%)	74.5	73.3	72.2	71.0	70.0	69.2	68.5	-1.0%
Blu-ray Disc player/recorders penetration (%)	18.2	20.1	21.8	22.6	23.0	22.7	22.0	-2.9%
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)	0.5	1.2	1.9	2.5	4.8	8.2	12.1	47.7%

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)	1,239.9	1,171.7	1,153.5	1,106.4	1,143.0	1,347.4	1,673.8	24.2%
Growth (%)		-5.5%	-1.5%	-4.1%	3.3%	17.9%	24.2%	
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)	18.5	16.7	13.5	11.4	8.3	5.6	4.1	-28.2%
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)	929.1	807.0	707.6	604.8	536.6	448.6	364.5	-18.8%
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)	947.6	823.7	721.1	616.1	544.9	454.3	368.5	-18.9%
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)	50.8	59.1	63.5	66.8	74.0	85.0	92.3	8.5%
Rental digital video (EUR m)	57.4	60.7	62.2	61.6	68.5	58.2	49.8	-14.4%
Subscription digital video (EUR m)	38.3	73.9	156.3	211.2	313.3	618.9	1,043.8	68.6%
Total digital video (EUR m)	146.5	193.7	281.9	339.6	455.8	762.1	1,185.9	55.6%
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)	145.8	154.3	150.5	150.7	142.2	131.0	119.3	-8.9%
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

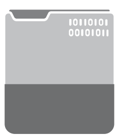
Key players in the market (in alphabetical order)

Physical	Digital
Auchan	Canal VOD
Carrefour	Google
Cultura	iTunes
DS	Orange
Fnac	SFR
Leclerc	TF1 VOD

Share of European market 2019

Physical retail
16.3%

Physical rental
3.5%



Digital video (OTT)
12.2%

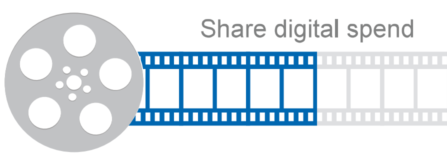
Pay TV TVOD
10.8%

Average home entertainment spending

Spending per TV household (EURO)
€59.3

Spending per broadband household (EURO)
€75.9

Digital share of spend vs. broadband speed



Share digital spend
71%

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

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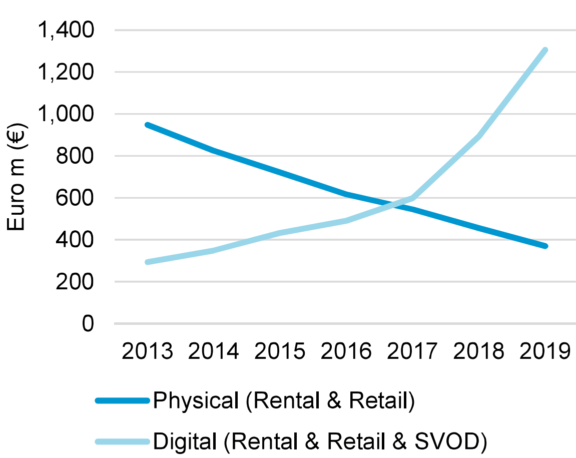
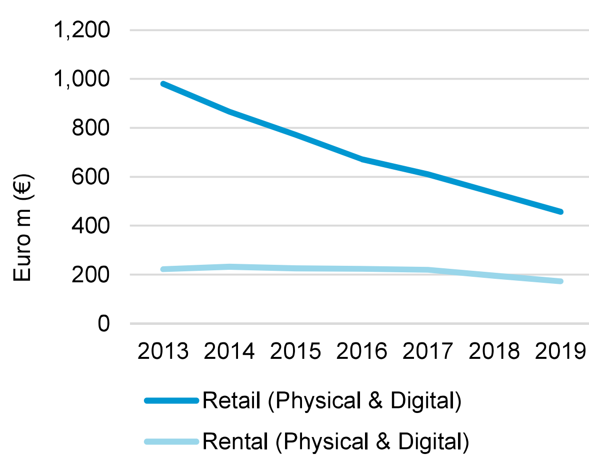
Comparison Physical vs Digital



Comparison Retail vs Rental



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

Source: Omdia