

# France

## France key data 2020

|  |         |   |          |
|--|---------|---|----------|
| Population (m)   | 65.3    | Consumer spending on digital video and TV VoD (€m) - Total Europe | 15,714.0 |
| TV households (m)  | 28.4    | Comparison with 2019  | 41.3%    |
| Consumer spending on physical video software (€m)                | 327.6   | Consumer spending on total video (€m)                             | 2,377.5  |
| Comparison with 2019   | -11.1%  | Comparison with 2019  | 37.9%    |
| Consumer spending on physical video software (€m) - Total Europe | 1,931.1 | Consumer spending on total video (€m) - Total Europe              | 17,645.1 |
| Comparison with 2019   | -17.9%  | Comparison with 2019  | 31.0%    |
| Consumer spending on digital video and TV VoD (€m)               | 2,049.9 |   |          |
| Comparison with 2019   | 51.3%   |   |          |

## France key commentary

### Market developments

The French video market experienced a 37.9% growth in consumer spending on video software (physical carriers and online) in 2020 compared to 2019. The total French video market now represents a value of around EUR 2.4 billion.

In 2020, the French DVD/Blu-Ray market saw a decline of 11.1% in value compared to 2019, closing at EUR 327 million. 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 store closures resulting from COVID-19 health and safety regulations certainly also played an important role.

The online market experienced healthy performance in 2020, in particular as regards SVOD services, contributing to offsetting the market performance of the physical formats.

### Other relevant developments

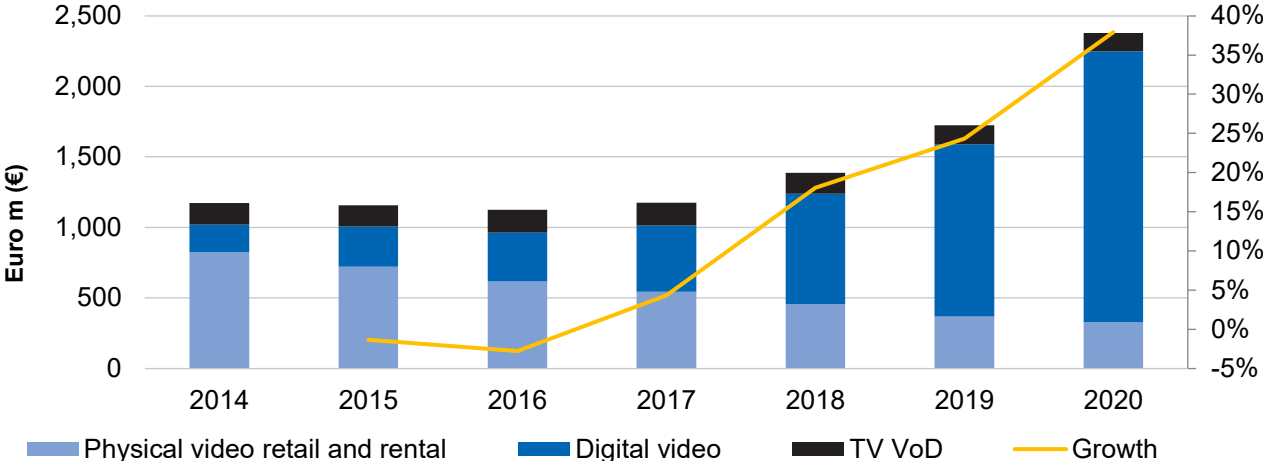
Thanks to the success in previous years, the promotional campaign « Fête de la VOD » was repeated in 2020 with a view to increasing consumer awareness about online distribution services and in particular to encourage and keep consumers engaged in the transactional digital market. For the 5th edition of the « Fête de la VOD » campaign, 8 online transactional platforms (Arte VOD, Canal VOD, FilmoTV, Orange, Universciné, Vidéofutur, La Cinétek, La Toile) participated, offering a wide range of titles and content for French consumers to discover via transactional digital models. During 4 days, French audiences were able watch films from 2 euros for a rental and 5 euros for a purchase.

### Piracy trends during the pandemic

Recent reports in [March 2021](#) and [May 2021](#) by the French IP protection authority, HADOPI, finds that piracy increased during the COVID-19 pandemic in France, despite an increase of legal offer during the same period. The HADOPI study revealed that 12.7 million users, i.e. 24% of French users, accessed cultural content each month on illegal websites in 2020. The first half of 2020, marked by the first lockdown, led to an increase in visits to illegal sites, peaking in March 2020 at 14.2 million of users. Furthermore, the HADOPI observed that the French audience accessing illegal content/sites is increasingly dispersed over a multitude of sites and services.

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

### Consumer spending by segment



## Video market: France

|  | 2014    | 2015    | 2016    | 2017    | 2018    | 2019    | 2020    | 19/20 % |
|--|---------|---------|---------|---------|---------|---------|---------|---------|
| <b>GENERAL</b>   |         |         |         |         |         |         |         |         |
| Population (m)   | 64.2    | 64.5    | 64.7    | 64.8    | 65.0    | 65.1    | 65.3    | 0.2%    |
| TV households (m)  | 27.2    | 27.5    | 27.7    | 27.9    | 28.0    | 28.2    | 28.4    | 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)                                   | 18.9    | 19.9    | 25.0    | 25.6    | 26.2    | 27.2    | 27.9    | 2.3%    |
| Nominal GDP (EUR m)  | 2,151.4 | 2,198.3 | 2,232.4 | 2,298.6 | 2,362.4 | 2,426.9 | 2,255.6 | -7.1%   |
| Consumer price index (100 in 2010)                         | 119.5   | 100.0   | 100.0   | 103.1   | 110.3   | 105.9   | 107.9   | 1.8%    |
| DVD Video player/recorder penetration (%)                  | 73.3    | 72.2    | 71.0    | 70.0    | 69.2    | 68.5    | 67.8    | -0.9%   |
| Blu-ray Disc player/recorders penetration (%)              | 20.1    | 21.8    | 22.6    | 23.0    | 22.7    | 22.0    | 21.1    | -4.1%   |
| 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)                                      | 1.2     | 1.9     | 2.5     | 4.8     | 8.2     | 12.0    | 20.3    | 69.2%   |

## Total video software market

|   | 2014    | 2015    | 2016    | 2017    | 2018     | 2019     | 2020     | 19/20 % |
|---|---------|---------|---------|---------|----------|----------|----------|---------|
| <b>CONSUMER LEVEL ALL VIDEO</b>   |         |         |         |         |          |          |          |         |
| <i>Total market figures include consumption of both physical and digital video.</i> |         |         |         |         |          |          |          |         |
| Total spending on video (EUR m)   | 1,173.7 | 1,157.9 | 1,125.9 | 1,174.4 | 1,386.3  | 1,723.7  | 2,377.5  | 37.9%   |
| Growth (%)  |         | -1.3%   | -2.8%   | 4.3%    | 18.0%    | 24.3%    | 37.9%    |         |
| 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.*

|  |         |         |         |         |         |         |         |        |
|--|---------|---------|---------|---------|---------|---------|---------|--------|
| Physical video rental (EUR m)                | 16.7    | 13.5    | 11.4    | 8.3     | 5.6     | 4.1     | 3.3     | -19.8% |
| 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)                | 807.0   | 707.6   | 604.8   | 536.6   | 448.6   | 364.5   | 324.4   | -11.0% |
| 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)              | 823.7   | 721.1   | 616.1   | 544.9   | 454.3   | 368.5   | 327.6   | -11.1% |
| 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.*

|  |         |         |         |         |         |         |          |       |
|--|---------|---------|---------|---------|---------|---------|----------|-------|
| Retail digital video (EUR m)             | 61.1    | 67.9    | 75.4    | 87.2    | 107.5   | 124.6   | 151.1    | 21.3% |
| Rental digital video (EUR m)             | 60.7    | 62.2    | 61.6    | 68.5    | 58.2    | 49.8    | 56.2     | 12.7% |
| Subscription digital video (EUR m)       | 73.9    | 156.3   | 211.2   | 313.3   | 618.9   | 1,046.5 | 1,714.1  | 63.8% |
| Total digital video (EUR m)              | 195.7   | 286.3   | 348.2   | 469.1   | 784.6   | 1,220.9 | 1,921.4  | 57.4% |
| 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.*

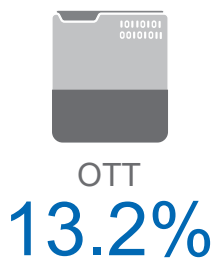
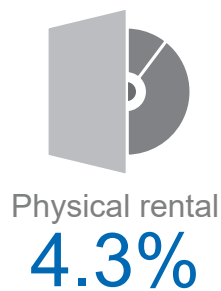
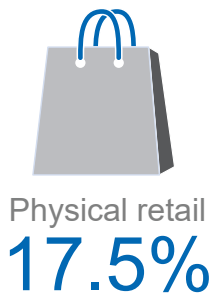
|                                  |       |       |       |         |         |         |         |       |
|----------------------------------|-------|-------|-------|---------|---------|---------|---------|-------|
| Pay TV TVOD (EUR m)              | 154.3 | 150.5 | 161.6 | 160.4   | 147.5   | 134.2   | 128.5   | -4.2% |
| 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 2021. 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.

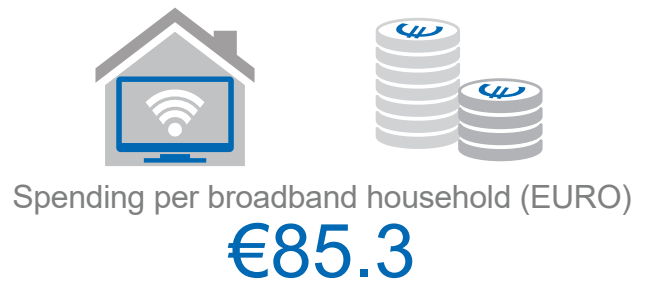
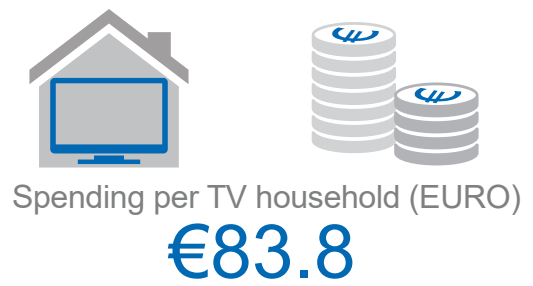
### Key players in the market (in alphabetical order)

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

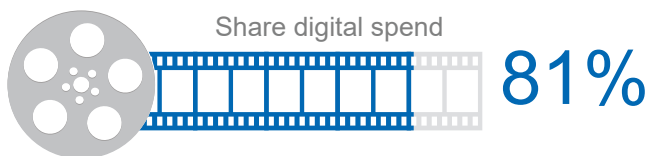
### Share of European market 2020



### Average home entertainment spending



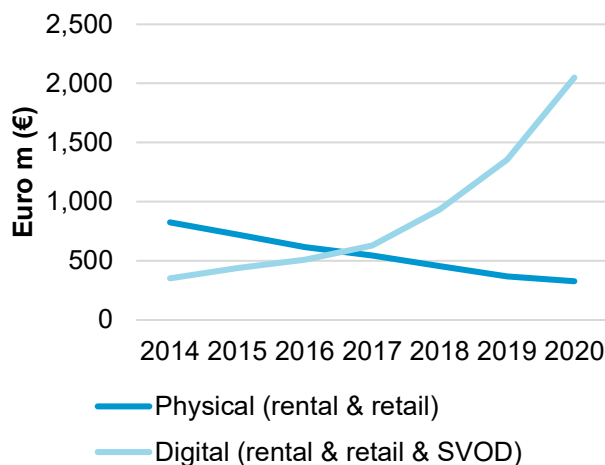
### Digital share of spend vs. broadband speed



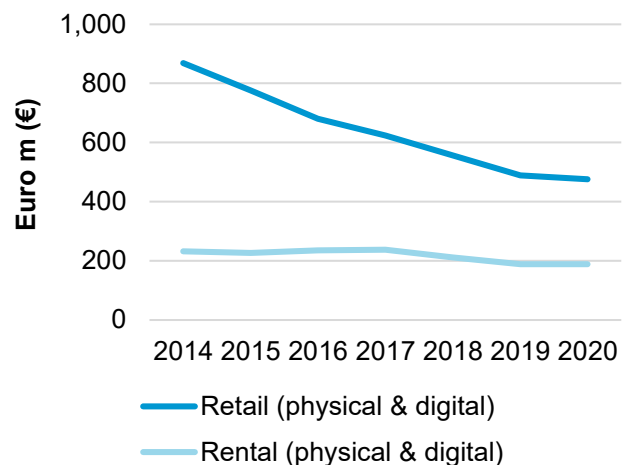
Broadband download speed rank  
(ranked across the 9 IVF countries)

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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