Belgium

Belgium: key data

Population	11.2m
TV households	4.8m
DVD Video player/recorder penetration	72.6%
Blu-ray Disc player/recorders penetration	19.9%
Consumer spending on physical video software	€ 165.1m
Comparison with 2012	-9.7%
DVD/ Blu-ray Disc split	€ 138.5m / € 26.6m
Video software rental/retail split (%)	6 / 94
Consumer spending on digital video and TV VOD	€ 75.3m
Comparison with 2012	38.2%
TV VOD/ Digital video split (%)	72 / 28

In 2013, the total Belgian video market slightly dropped with consumer spending at EUR 229.5 million, -3.3 per cent less than in 2012. Physical formats (DVD and Blu-ray) remain the biggest segment with 67 per cent of market share. Almost 10 million DVDs and 1,4 million Blu-ray Discs were sold, resulting in a decrease of the physical format of 14.6 per cent in value compared to 2012.

Digital video (iVOD, TVOD, EST) grew by almost 39 per cent, resulting in total consumer spending of EUR 75.3 million.

The best-selling DVDs and Blu-ray discs were 'The Hobbit – An Unexpected Journey", "James Bond 007 – Skyfall" and "Twilight – Breaking Dawn 2". Two Belgian productions were also part of the top 10 in the charts: the Oscar nominated "The Broken Circle Breakdown" and children's movie "K3 Bengeltjes".

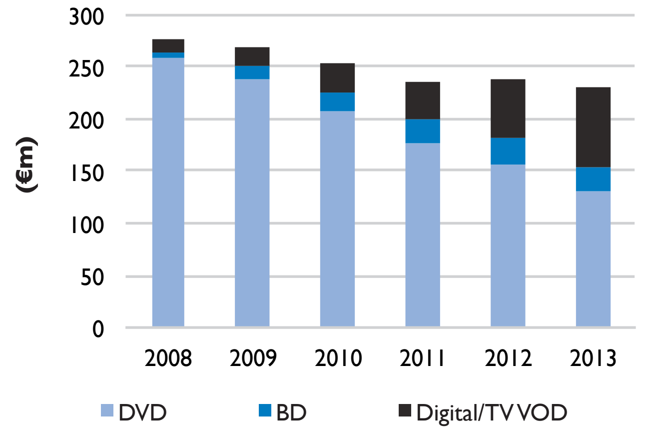
Other relevant developments

In 2013, Belgian internet users' traffic to sites and platforms offering infringing content dropped by 25 per cent. This decrease can mostly be attributed to the growing success of legal download- and streaming platforms, as well as to measures ordered by Belgian courts requiring ISPs to block access to 11 sites that infringe IP rights.

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

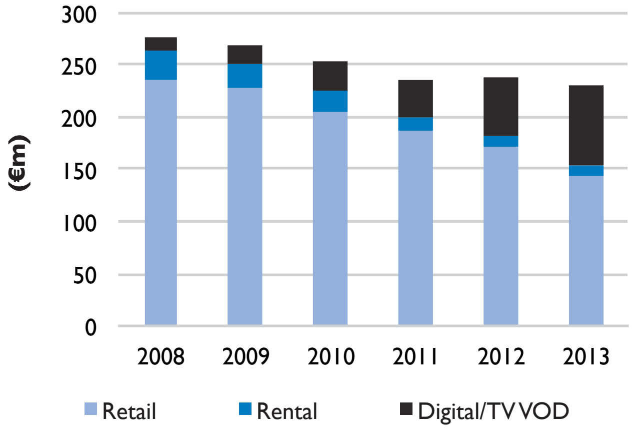
Video market: Belgium

Consumer spending by format



Source: IHS/IVF/BEA VIDEO © 2014 IHS

Consumer spending by sector



Source: IHS/IVF/BEA VIDEO © 2014 IHS

		2008	2009	2010	2011	2012	2013	12/13
EXCHANGE RATES								
Exchange rate: $1=	Euro	0.68	0.72	0.75	0.72	0.78	0.75	
GENERAL								
Population	m	10.8	10.8	11	11	11.1	11.2	0.3%
Households	m	4.6	4.7	4.7	4.8	4.8	4.9	0.8%
HARDWARE								
TV households	m	4.6	4.6	4.7	4.7	4.8	4.8	0.8%
DVD sector								
DVD Video player/recorder households	m	3.3	3.5	3.6	3.6	3.6	3.5	-3.0%
Penetration of TV households	%	72.1	76.2	77.1	76.9	75.4	72.6	-3.7%
DVD console households	m	0.9	0.9	0.9	1.0	0.9	0.8	-12.1%
Penetration of TV households	%	19.5	19.5	19.7	20.4	19.6	17.1	-12.8%
BD sector								
BD standalone player households	m	0.01	0.06	0.14	0.33	0.64	0.96	48.2%
Penetration of TV households	%	0.2	1.3	3.1	6.9	13.5	19.9	47.1%
PS3 console households	m	0.2	0.3	0.4	0.6	0.7	0.8	19.0%
Penetration of TV households	%	4.0	6.5	9.0	12.0	14.4	17.0	18.1%

Total video software market

		2008	2009	2010	2011	2012	2013	12/13
CONSUMER LEVEL ALL VIDEO								
Total market figures include spending on both physical and digital video								
Total spending on video	Euro m	275.4	269.1	252.6	236.4	237.2	229.4	-3.3%

		2008	2009	2010	2011	2012	2013	12/13
CONSUMER LEVEL PHYSICAL VIDEO								
Total market figures include revenues from legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.								
Total spending on video software	Euro m	264.8	250.9	225.4	200.2	182.7	154.1	-15.7%
Total spending on retail video	Euro m	235.9	228.5	205.6	187.9	172.6	144.4	-16.3%
Total spending on rental video	Euro m	28.9	22.4	19.8	12.3	10.1	9.7	-4.5%

Video market: Belgium

		2008	2009	2010	2011	2012	2013	12/13
Owing to a definitional change, digital video and TV VOD numbers may differ from those published in the 2012 IVF Yearbook.								
CONSUMER LEVEL DIGITAL VIDEO								
The purchase or rental of movies and TV series delivered over the open internet through transactional models (also known as EST, DTO, Internet VOD) or on a subscription basis.								
Total spending on digital video	Euro m	0.4	0.4	0.3	1.2	9.8	21.4	118.0%
CONSUMER LEVEL TV VOD								
The delivery of movies and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services.								
Total spending on TV VOD	Euro m	10.3	17.8	26.9	35.0	44.7	53.9	20.6%

Retail video market

		2008	2009	2010	2011	2012	2013	12/13
Outlets stocking retail video	no.	2,400	2,352	2,305	1,544	1,200		
Retail chains with 10 or more outlets	no.	10	10	9	6	6		
Kiosks stocking retail video	no.	600	570	542	363	280		
Consumer level: DVD retail								
Spending on retail DVD	Euro m	230.5	217.0	189.5	166.1	148.2	121.3	-18.4%
Retail DVDs sold to consumers	m	19.2	17.6	15.5	13.8	12.3	10.0	-19.0%
Average consumer price	Euro	12.03	12.35	12.22	12.05	12.01	12.13	1.0%
Consumer level: BD retail								
Spending on retail BD	Euro m	5.3	11.5	16.1	21.8	24.4	23.1	-5.3%
Retail BDs sold to consumers	m	0.2	0.5	0.8	1.2	1.5	1.4	-4.8%
Average consumer price	Euro	26.70	23.96	20.14	18.02	16.59	16.50	-0.6%

Rental video market

		2008	2009	2010	2011	2012	2013	12/13
Rental video market data includes both store-based rental and physical rent-by-mail operations where relevant.								
Video rental outlets	no.	750	700	560	382	300		
Rental chains with 10 or more outlets	no.	9	7	5	3	3		
Consumer level: DVD rental								
Spending on DVD rental	Euro m	28.8	22.2	18.7	11.4	9.4	9.1	-2.8%
DVD rental transactions	m	9.2	7.0	6.0	3.6	2.9	2.8	-4.6%
Average rental price	Euro	3.14	3.20	3.14	3.16	3.23	3.29	1.9%
Consumer level: BD rental								
Spending on BD rental	Euro m	0.06	0.18	1.06	0.85	0.74	0.55	-25.4%
BD rental transactions	m	0.02	0.06	0.34	0.27	0.23	0.17	-26.3%
Average rental price	Euro	3.14	3.20	3.14	3.16	3.23	3.27	1.2%

Source: IHS/IVF/BEA
Population and household figures: IHS Global Insight
Note: Distributor level excludes and consumer level includes VAT/sales tax.
Note: Consumer level digital video and TV VOD figures may differ from locally published figures due to the application of different definitions.

Film DVD & Blu-ray Disc combined

Rank	Title	Studio
1	Hobbit: An Unexpted Journey	Warner Home Video
2	James Bond 007: Skyfall	Twentieth Century Fox
3	Twilight Saga: Breaking Dawn Part 2	Belga Films
4	Fast & Furious 6	Universal Pictures
5	Game of Thrones 2	Warner Home Video
6	Broken Circle Breakdown	Lumiere Home Entertainment
7	K3-Bengeltjes	Studio 100
8	Despicable Me 2	Universal Pictures
9	Hunger Games	Belga Films
10	Django Unchained	Sony Pictures Home Entertainment

Source: BEA Video
Notes: 1. Ranking based on retail sales by volume
2. Units sold based on available data

DVD made for TV

Rank	Title	Distributor
1	Game of Thrones 2	Warmer Home Video
2	Game of Thrones	Warmer Home Video
3	Homeland	Twentieth Century Fox
4	Maya De Bij: De Bijendans	Studio 100
5	Plop: En De Kabouterkermis	Studio 100
6	Dragon Ball 9/49-54	Belga Films
7	Homeland 2	Twentieth Century Fox
8	Eigen Kweek	VRT
9	Maya De Bij: Opgepast Voor De Beer	Studio 100
10	Gossip Girl 6	Warmer Home Video

Source: BEA Video
Notes: 1. Ranking based on retail sales by volume
2. Units sold based on available data