France

France: key data

Population	63.4m
TV households	26.8m
DVD Video player/recorder penetration	72.8%
Blu-ray Disc player/recorders penetration	16.0%
Consumer spending on physical video software	€ 950m
Comparison with 2012	-16.6%
DVD/ Blu-ray Disc split	€ 0.7bn / € 206.4m
Video software rental/retail split (%)	2 / 98
Consumer spending on digital video and TV VOD	€ 278.4m
Comparison with 2012	6.5%
TV VOD/ Digital video split (%)	54 / 46

DVD and Blu-ray market

In 2013, the French DVD and Blu-ray (BD) market declined to EUR 950 million. This is the first time in many years that the French home entertainment market has fallen below the 1 billion mark.

In 2013, the number of units sold to consumers declined by 14.1 per cent to 103 million units.

Blu-ray represented 22 per cent of the turnover in physical video carriers (compared to 20 per cent in 2012) and with 13 million units sold.

This decrease is due to various factors: the high level of internet piracy in the French market, the lack of blockbuster titles in the 2013 catalogue, the closure of retail entertainment stores such as "Virgin", and the increase of new viewing habits e.g. catch-up TV.

Feature films represented 60 per cent of the French DVD and BD market (62 per cent in 2012). The non-film market declined by 8.4 per cent.

French feature films represented almost 20 per cent of the physical market at EUR 110 million. This represents a large decrease compared to 2012, when sales totalled EUR 165 million, although this was largely explained by the success of the French film "Intouchables" that year.

Online distribution

In 2013, the online video market did not continue the successful growth of recent years.

Online video revenues decreased slightly to EUR 245 million, compared with EUR 252 million in 2012.

However, the number of online distribution platforms has increased with more than 85 platforms available.
There are more than 3500 titles available, of which 1700 are films. It is important to note that these figures are averages and can vary over the year. The fast turnover in available titles means that films can be removed from an online platform's catalogue within the course of the year. This can sometimes create confusion for consumers.

Other relevant developments

Catch-up TV is very successful and is used by 69 per cent of Internet users.

For the first time, the preferred means for watching catch-up TV is via the TV (61 per cent). Tablets and smartphones are also increasingly used for watching catch-up TV (18 per cent).
More than 200 million programmes are watched each month.

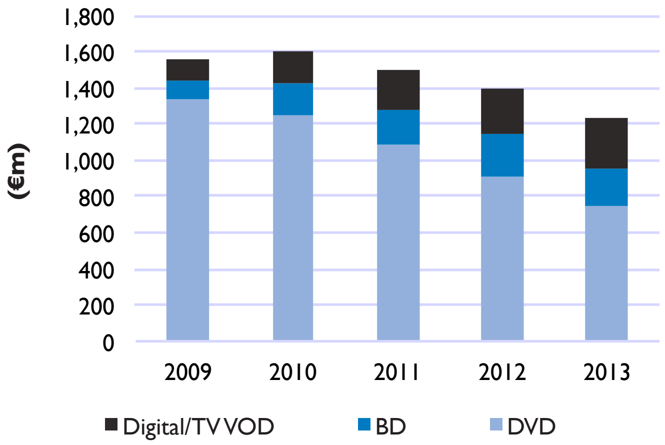
Despite the release of several government-commissioned reports reflecting on the future film and audiovisual landscape in France, little improvement has been seen with respect to addressing infringement of copyright in films. French film sector right holders achieved an important first victory in court in the *Allostreaming* case, but the procedure is ongoing, pending appeal.

The Hadopi law addressing online infringements was reviewed in 2013. The graduated response mechanism (message-sending upon determination of infringement) has been preserved, but the accompanying sanctions have been modified and reduced.

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

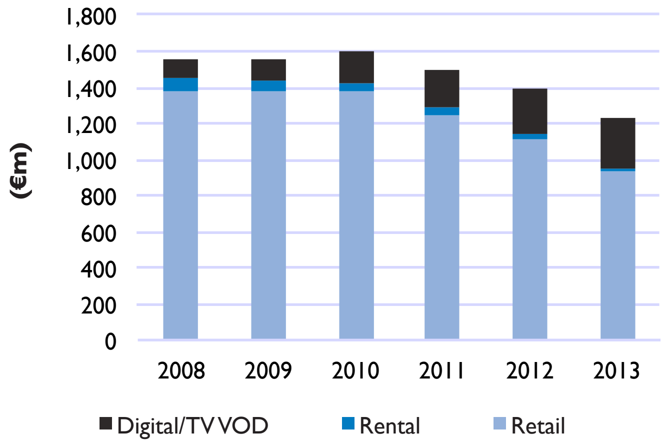
Video market: France

Consumer spending by format



Source: IHS/IVF/SEVN

Consumer spending by sector



Source: IHS/IVF/SVEN

		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	62.0	62.3	62.6	62.9	63.2	63.4	0.4%
Households	m	26.5	26.7	26.9	27.1	27.3	27.5	0.7%
HARDWARE								
TV households	m	25.7	25.9	26.1	26.3	26.6	26.8	0.8%
DVD sector								
DVD Video player/recorder households	m	19.6	19.3	19.5	19.6	19.6	19.5	-0.3%
Penetration of TV households	%	76.4	74.6	74.6	74.3	73.6	72.8	-1.1%
DVD console households	m	5.2	5.6	6.2	6.7	6.6	6.0	-9.3%
Penetration of TV households	%	20.3	21.6	23.6	25.3	24.8	22.3	-10.1%
BD sector								
BD standalone player households	m	0.13	0.39	0.97	2.30	4.29	4.29	
Penetration of TV households	%	0.5	1.5	3.7	8.7	16.1	16.0	-0.8%
PS3 console households	m	1.3	2.1	2.9	3.7	4.4	5.2	17.7%
Penetration of TV households	%	4.9	8.0	11.1	14.0	16.7	19.5	16.7%

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	1,557.7	1,560.9	1,600.9	1,496.8	1,400.6	1,228.5	-12.3%

Video market: France

		2008	2009	2010	2011	2012	2013	12/13
CONSUMER LEVEL PHYSICAL VIDEO								
Total market figures include spending on legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.								
Total spending on video software	Euro m	1,454.4	1,441.4	1,428.6	1,284.7	1,139.2	950.1	-16.6%
Total spending on retail video	Euro m	1,383.6	1,384.4	1,385.3	1,251.7	1,116.3	929.1	-16.8%
Total spending on rental video	Euro m	70.8	57.1	43.3	33.1	22.9	21.0	-8.3%

		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	7.3	10.7	19.5	47.6	78.6	106.4	35.3%
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 digital video	Euro m	10.7	19.5	47.7	78.8	107.0	127.2	18.8%

Retail video market

		2008	2009	2010	2011	2012	2013	12/13
Outlets stocking retail video	no.	6,500	6,380	5,850	5,320	5,000		
Retail chains with 10 or more outlets	no.	30	30	30	30	30		
Kiosks stocking retail video	no.	15,000	15,000	14,500	14,000	13,680		
Consumer level: DVD retail								
Spending on retail DVD	Euro m	1,331.0	1,277.1	1,211.9	1,048.8	892.6	724.2	-18.9%
Retail DVDs sold to consumers	m	85.1	89.3	86.8	76.6	71.5	60.7	-15.1%
Average consumer price	Euro	15.63	14.30	13.97	13.69	12.48	11.93	-4.4%
Consumer level: BD retail								
Spending on retail BD	Euro m	49.6	107.3	173.4	202.9	223.7	204.9	-8.4%
Retail BDs sold to consumers	m	2.1	5.3	8.1	9.9	11.1	10.2	-7.6%
Average consumer price	Euro	24.18	20.33	21.30	20.49	20.20	20.02	-0.9%

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.	1,700	1,500	1,400	1,000	810		
Rental chains with 10 or more outlets	no.	9	8	7	7	7		
Consumer level: DVD rental								
Spending on DVD rental	Euro m	70.8	56.9	42.1	31.7	21.3	19.5	-8.6%
DVD rental transactions	m	25.3	20.0	14.7	10.8	7.0	6.3	-9.5%
Average rental price	Euro	2.79	2.84	2.86	2.93	3.05	3.08	1.0%
Consumer level: BD rental								
Spending on BD rental	Euro m	0.00	0.17	1.22	1.37	1.57	1.50	-4.7%
BD rental transactions	m	0.00	0.06	0.43	0.47	0.51	0.49	-5.7%
Average rental price	Euro	2.79	2.84	2.86	2.93	3.05	3.08	1.0%

Source: IHS/IVF/SEVN
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.

DVD & Blu-ray combined

Genre	% share
1	Le Hobbit: Un Voyage Inattendu
2	Skyfall
3	Twilight: Chapitre 5 - révélation 2 partie
4	Les Enfoirés 2013 - la boite à musiques des Enfoirés
5	Iron Man 3
6	Django Unchained
7	Moi, moche et mérchant 2
8	Fast and Furious 6
9	Man of Steel
10	Taken 2
11	Game of Thrones: Saison 2
12	Les Cinq Légendes
13	Batman: The Dark Knight Rises
14	L'Odyssée di Pi
15	World War Z
16	Wolverine: Le Combat de l'immortel
17	Oblivion
18	Avatar
19	Twilight: Chapitre 4 - révélation 1 partie
20	Insaisissables

Source: Syndicat de l'Edition Vidéo Numerique (SEVN)
Notes: 1. Ranking based on retail sales by volume
2. Units sold based on available data