France

France: key data 2025

Population (m)	66.7
TV households (m)	28.0
Consumer spending on total video (€m)	4,726.2
Comparison with 2024	13.9%
Consumer spending on digital video and TV VoD (€m)	4,569.9
Comparison with 2024	15.2%
Consumer spending on physical video software (€m)	156.2
Comparison with 2024	-15.1%

Consumer spending on total video (€m) - Total Europe	35,795.1
Comparison with 2024	13.3%
Consumer spending on digital video and TV VoD (€m) - Total Europe	35,075.6
Comparison with 2024	14.4%
Consumer spending on physical video software (€m) - Total Europe	719.5
Comparison with 2024	-21.0%

France key commentary

Market developments

The French video market experienced a 13.9% growth in consumer spending on video software (physical carriers and online) in 2025 compared to 2024. The total French video market now represents a value of around EUR 4,7 billion.

In 2025, the French DVD/Blu-Ray market contracted by 16% in value compared to 2024, closing at EUR 153 million.

The contraction 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. Nevertheless, 4K UHD format already accounts for 20 per cent of turnover, box sets for 36 per cent, and the average price is rising.

Digital consumption (digital video transactions (sell-through and rental) and TV VOD) reached total consumer spending of EUR 4,57 billion, showing growth of 15.2% compared with 2024.

The online market experienced healthy performance in 2025, as regards SVOD services, contributing to offsetting the declining market performance of the physical formats.

Finally, the average monthly audience of internet users engaging in cultural piracy has fallen sharply: from 15.4 million in 2018 to 4.6 million in 2025, according to Médiamétrie.

Other developments

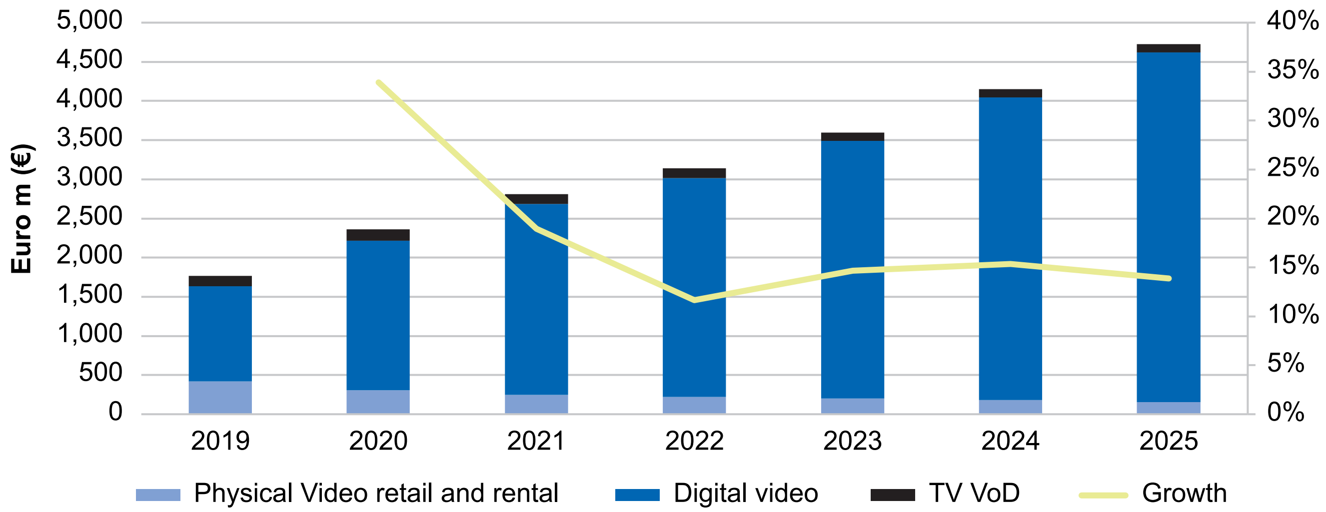
In France, DEGI and SEVN confirmed the return of the “VODays” consumer campaign for its 5th edition in January 2026. Following the success of previous campaigns this initiative was brought to the market a week-long digital campaign across eleven of the top digital retailer platforms in France offering audiences a selection of new and popular films at promotional prices across both sell-through and rental options.

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

Video market: France

	2019	2020	2021	2022	2023	2024	2025	24/25
GENERAL								
Population (m)	65.7	65.9	66.1	66.3	66.4	66.5	66.7	0.2%
TV households (m)	26.9	27.1	27.4	27.6	27.7	27.9	28.0	0.5%
Population Total Europe (m)	638.1	638.8	638.7	640.6	642.5	642.2	640.9	-0.2%
TV households Total Europe (m)	258.5	259.6	259.4	260.4	262.9	264.1	264.5	0.2%
Broadband households (m)	25.5	26.2	27.0	27.4	27.8	28.1	28.4	1.1%
Nominal GDP (EUR m)	2,426.9	2,255.6	2,396.6	2,517.6	2,588.2	2,646.6	2,703.4	2.1%
Consumer price index (100 in 2010)	105.9	107.9	110.6	112.7	118.0	123.7	127.1	2.7%
DVD Video player/recorder penetration (%)	71.8	70.9	69.7	68.6	67.6	66.6	64.7	-2.9%
Blu-ray Disc player/recorders penetration (%)	23.1	22.1	20.9	19.9	18.9	18.2	17.5	-3.6%
DVD Video player/recorder Total Europe (%)	60.9	58.7	56.8	54.8	52.6	50.9	48.8	-4.1%
Blu-ray Disc player/recorders penetration Total Europe (%)	22.3	21.6	21.0	20.2	19.4	18.7	18.2	-3.1%
OTT Subscriptions (m)	12.4	22.5	26.9	32.4	34.3	37.5	40.3	7.5%

Consumer spending by segment



Total video software market

	2019	2020	2021	2022	2023	2024	2025	24/25
CONSUMER LEVEL ALL VIDEO								
Total market figures include consumption of both physical and digital video								
Total spending on video (EUR m)	1,764.3	2,362.7	2,810.3	3,138.4	3,598.1	4,150.1	4,726.2	13.9%
Growth (%)		33.9%	18.9%	11.7%	14.6%	15.3%	13.9%	
Total spending on video Total Europe (EUR m)	13,405.6	17,667.2	21,515.8	24,335.6	27,508.5	31,585.1	35,795.1	13.3%
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 of 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)	129.1	156.6	153.2	168.6	171.9	177.3	182.1	2.7%
Rental digital video (EUR m)	53.3	57.1	45.8	48.2	47.4	45.9	44.6	-2.8%
Subscription digital video (EUR m)	1,033.9	1,698.4	2,239.1	2,575.8	3,073.2	3,638.1	4,237.3	16.5%
Total digital video (EUR m)	1,216.3	1,912.1	2,438.0	2,792.6	3,292.6	3,861.3	4,464.0	15.6%
Total digital video Total Europe (EUR m)	10,076.6	14,819.3	19,145.8	22,142.9	25,526.7	29,730.0	34,129.7	14.8%
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)	126.6	145.4	124.1	122.2	105.4	104.9	105.9	0.9%
Pay TV TVOD Total Europe (EUR m)	997.4	1,064.8	1,006.2	1,026.7	963.9	944.5	945.9	0.1%
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)	4.0	2.7	2.6	1.9	1.6	1.3	1.1	-17.0%
Physical video rental Total Europe (EUR m)	109.5	66.9	43.3	30.1	21.8	16.2	11.6	-28.6%
Physical video retail (EUR m)	417.4	302.6	245.5	221.6	198.5	182.6	155.1	-15.1%
Physical video retail Total Europe (EUR m)	2,222.0	1,716.2	1,320.5	1,135.9	996.1	894.4	707.9	-20.8%
Physical video software (EUR m)	421.4	305.2	248.2	223.5	200.2	183.9	156.2	-15.1%
Physical video software Total Europe (EUR m)	2,331.5	1,783.1	1,363.8	1,166.0	1,017.9	910.6	719.5	-21.0%

*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, updated data sources and other data restatements. **3)** The current online figures are a snapshot of the market in June 2026. 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.*

Key players in the market (in alphabetical order)

Physical		Digital
Amazon	Leclerc	Amazon Primevideo
Auchan		Canal+
Carrefour		Google
Cultura		Apple
DS		Orange
Fnac		

Share of European market 2025

Digital video (OTT)
13.1%

Pay TV TVOD
11.2%

Physical retail
9.5%

Physical rental
21.9%

Average home entertainment spending

Spending per TV household (EURO)
€168.6

Spending per broadband household (EURO)
€166.2

Digital share of spend vs. broadband speed

Share digital spend
94%

Broadband subscriptions speed rank
(ranked across the 9 IVF countries)*
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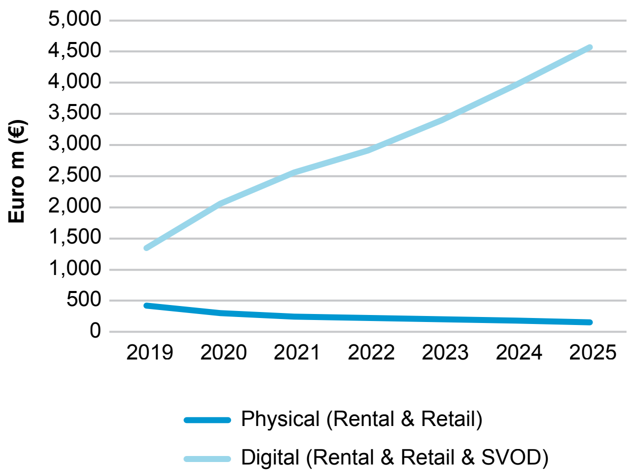
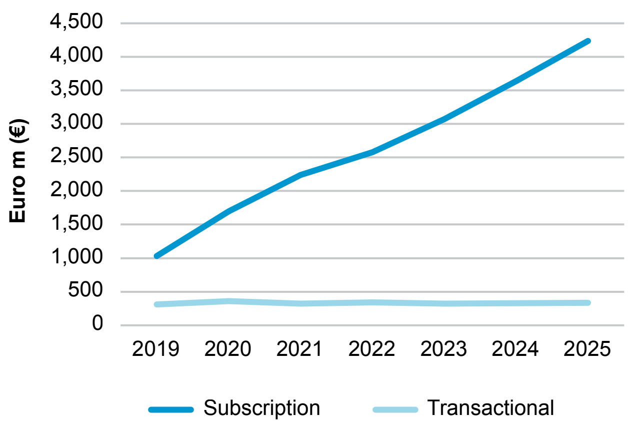
Comparison Physical vs Digital



Comparison Subscription vs Transactional



Note: Digital (Rental & Retail) includes SVOD data; Transactional excludes physical.
*Countries are ranked based on the proportion of broadband subscriptions receiving fixed data at speed over 30Mbps.

Source: Omdia