Belgium

Belgium key data 2022

Population (m)	11.7
TV households (m)	4.9
Consumer spending on total video (€m)	422.3
Comparison with 2021	4.0%
Consumer spending on digital video and TV VoD (€m)	397.1
Comparison with 2021	5.7%
Consumer spending on physical video software (€m)	25.1
Comparison with 2021	-17.6%

Consumer spending on total video (€m) - Total Europe	23,276.4
Comparison with 2021	9.4%
Consumer spending on digital video and TV VoD (€m) - Total Europe	22,110.8
Comparison with 2021	11.1%
Consumer spending on physical video software (€m) - Total Europe	1,165.6
Comparison with 2021	-14.7%

Belgium key commentary

Market developments

In 2022, the total Belgian video market (digital and physical) grew by 4%, resulting in total consumer spending of EUR 422.3 million on all video content distributed through various online models and on physical carriers.

As expected, the market for physical discs experienced a decline of 17.6% in value compared to 2021, finishing the year with EUR 25.1 million worth of final total consumer spending on physical carries in Belgium in 2022.

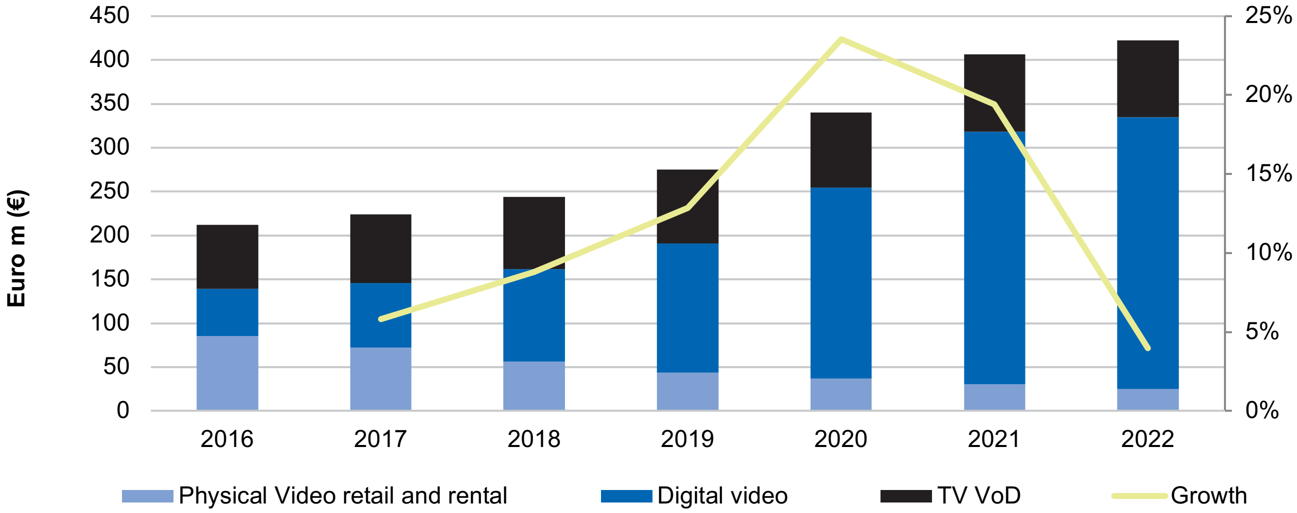
Digital consumption (digital video transactions (sell-through and rental) and TV VOD) reached total consumer spending of EUR 397.2 million, showing growth of 5.7% compared with 2021. This development goes some way towards balancing the decline in the market performance of the physical formats.

This commentary was provided the International Video Federation.

Video market: Belgium

	2016	2017	2018	2019	2020	2021	2022	21/22
GENERAL								
Population (m)	11.4	11.4	11.5	11.5	11.6	11.6	11.7	0.3%
TV households (m)	4.7	4.7	4.8	4.8	4.9	4.9	4.9	0.7%
Population Total Europe (m)	631.1	632.8	634.4	635.7	636.7	637.3	637.7	0.1%
TV households Total Europe (m)	260.2	262.1	263.8	265.7	267.6	269.2	270.7	0.6%
Broadband households (m)	3.4	3.5	3.6	3.6	3.8	3.9	3.9	0.4%
Nominal GDP (EUR m)	430.1	445.0	460.4	476.2	447.2	464.9	488.2	5.0%
Consumer price index (100 in 2010)	101.5	105.7	113.3	108.8	110.7	113.7	116.1	2.1%
DVD Video player/recorder penetration (%)	53.5	47.6	41.9	36.6	31.8	27.6	24.0	-13.4%
Blu-ray Disc player/recorder penetration (%)	25.9	26.2	25.6	24.4	23.1	21.6	20.3	-6.0%
DVD Video player/recorder Total Europe (%)	67.0	64.4	61.7	59.2	56.9	54.7	52.7	-3.7%
Blu-ray Disc player/recorders penetration Total Europe (%)	21.8	22.3	22.3	21.7	21.0	20.2	19.4	-3.9%
OTT Subscriptions (m)	0.7	1.0	1.3	1.9	2.7	3.1	3.4	10.3%

Consumer spending by segment



Total video software market

	2016	2017	2018	2019	2020	2021	2022	21/22
CONSUMER LEVEL ALL VIDEO								
Total market figures include consumption of both physical and digital video								
Total spending on video (EUR m)	211.9	224.2	244.0	275.3	340.1	406.1	422.3	4.0%
Growth (%)		5.8%	8.8%	12.9%	23.5%	19.4%	4.0%	
Total spending on video Total Europe (EUR m)	9,204.5	9,924.5	11,389.9	13,601.0	17,690.1	21,274.6	23,276.4	9.4%
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)	3.7	4.2	4.5	4.7	5.1	4.8	5.1	6.2%
Rental digital video (EUR m)	5.3	5.9	6.6	6.1	9.6	12.0	7.6	-36.2%
Subscription digital video (EUR m)	44.9	63.4	94.1	135.8	203.0	271.1	296.7	9.4%
Total digital video (EUR m)	53.9	73.4	105.1	146.6	217.7	287.9	309.5	7.5%
Total digital video Total Europe (EUR m)	4,068.6	5,387.4	7,505.6	10,135.9	14,705.6	18,771.8	21,019.0	12.0%
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)	72.7	78.3	82.6	84.7	85.6	87.6	87.7	0.0%
Pay TV TVOD Total Europe (EUR m)	947.5	1,027.4	1,076.1	1,130.6	1,198.4	1,136.1	1,091.8	-3.9%
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)	3.6	2.5	1.6	1.0	0.7	0.5	0.3	-31.2%
Physical video rental Total Europe (EUR m)	295.4	214.6	144.8	109.5	66.9	43.3	30.6	-29.5%
Physical video retail (EUR m)	81.7	70.0	54.7	43.0	36.0	30.0	24.8	-17.4%
Physical video retail Total Europe (EUR m)	3,892.9	3,295.0	2,663.4	2,225.0	1,719.2	1,323.4	1,135.0	-14.2%
Physical video software (EUR m)	85.3	72.5	56.3	44.0	36.8	30.5	25.1	-17.6%
Physical video software Total Europe (EUR m)	4,188.3	3,509.7	2,808.2	2,334.5	1,786.1	1,366.7	1,165.6	-14.7%

*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 2023. 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
Bol.com	BETV / VOO
Carrefour	Google Play
Cora	iTunes
Fnac	Netflix
Mediamarkt	Proximus
Standaard Boekhandel	Telenet

Share of European market 2022

Digital video (OTT)
1.5%

Pay TV TVOD
8.0%

Physical retail
2.2%

Physical rental
1.1%

Average home entertainment spending

Spending per TV household (EURO)
€85.9

Spending per broadband household (EURO)
€107.5

Digital share of spend vs. broadband speed

Share digital spend
73%

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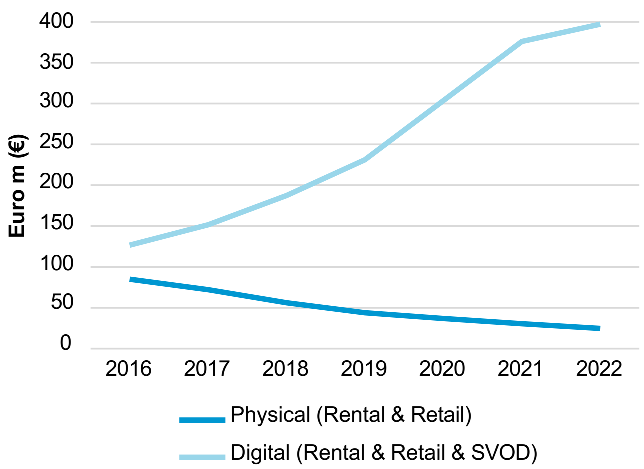
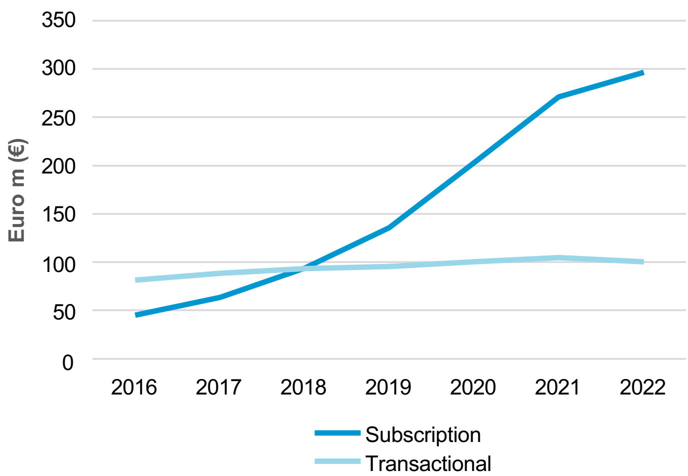
Comparison Physical vs Digital



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