

Belgium

Belgium key data 2020

Population (m)	11.6	Consumer spending on digital video and TV VoD (€m) - Total Europe	15,714.0
TV households (m)	4.9	Comparison with 2019	41.3%
Consumer spending on physical video software (€m)	36.7	Consumer spending on total video (€m)	344.1
Comparison with 2019	-16.4%	Comparison with 2019	24.3%
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)	307.3		
Comparison with 2019	32.0%		

Belgium key commentary

Market developments

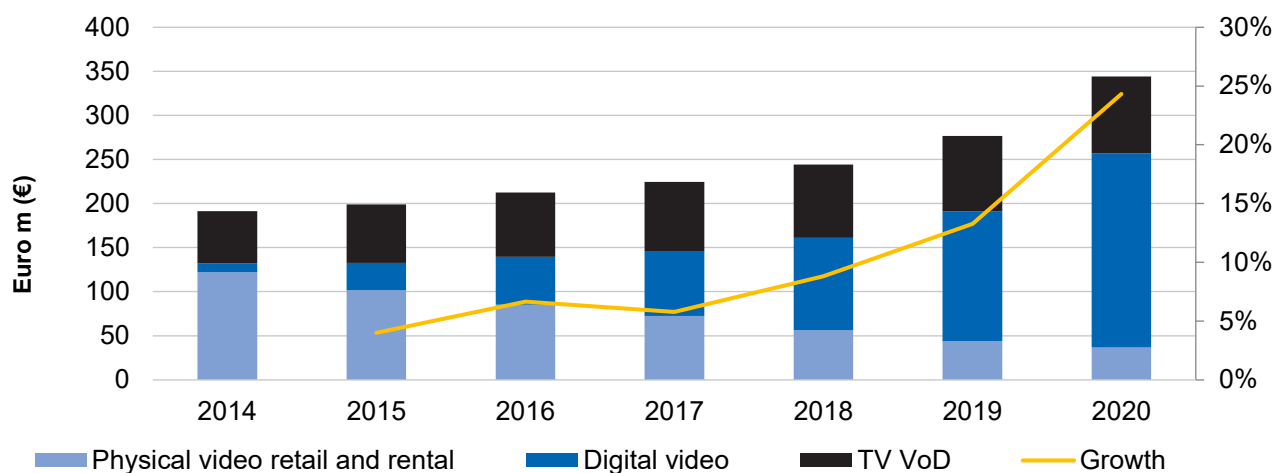
In 2020, the total Belgian video market (digital and physical) grew by 24.3%, resulting in total consumer spending of EUR 344.1 million on all video content distributed online and on physical carriers.

However, the market for physical discs experienced a decline of 16.4% in value compared to 2019, finishing the year with EUR 36.7 million worth of final total consumer spending for Belgium in 2020.

Digital consumption (digital video transactions and TV VOD) reached total consumer spending of EUR 307.3 million, showing a growth of 32% compared with 2019, and going some way towards balancing the decline in the market performance of the physical formats.

This commentary was provided by the International Video Federation.

Consumer spending by segment



Video market: Belgium

	2014	2015	2016	2017	2018	2019	2020	19/20 %
GENERAL								
Population (m)	11.2	11.3	11.4	11.4	11.5	11.5	11.6	0.4%
TV households (m)	4.6	4.7	4.7	4.7	4.8	4.8	4.9	0.7%
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)	3.5	3.7	3.5	3.5	3.6	3.7	3.7	0.9%
Nominal GDP (EUR m)	403.0	416.7	430.1	445.0	460.4	476.2	447.2	-6.1%
Consumer price index (100 in 2010)	118.9	100.0	101.5	105.7	113.3	108.8	110.7	1.7%
DVD Video player/recorder penetration (%)	64.3	59.1	53.5	47.6	41.9	36.6	31.8	-13.0%
Blu-ray Disc player/recorders penetration (%)	23.4	25.3	25.9	26.2	25.6	24.4	23.1	-5.3%
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)	0.2	0.5	0.7	1.0	1.3	1.9	2.5	35.3%

Total video software market

	2014	2015	2016	2017	2018	2019	2020	19/20 %
CONSUMER LEVEL ALL VIDEO								
<i>Total market figures include consumption of both physical and digital video.</i>								
Total spending on video (EUR m)	191.5	199.1	212.3	224.6	244.4	276.8	344.1	24.3%
Growth (%)		4.0%	6.6%	5.8%	8.8%	13.3%	24.3%	
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)	6.3	4.9	3.6	2.5	1.6	1.0	0.7	-28.6%
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)	115.7	96.8	81.7	70.0	54.7	43.0	36.0	-16.2%
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)	122.1	101.7	85.3	72.5	56.3	44.0	36.7	-16.4%
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)	3.0	3.3	3.8	4.2	4.5	4.6	5.2	11.3%
Rental digital video (EUR m)	4.5	4.9	5.6	6.0	6.5	7.0	9.7	39.5%
Subscription digital video (EUR m)	2.8	22.6	44.9	63.4	93.9	135.5	205.3	51.6%
Total digital video (EUR m)	10.3	30.8	54.3	73.6	104.9	147.1	220.2	49.8%
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)	59.1	66.6	72.7	78.5	83.2	85.8	87.1	1.6%
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
Bol.com	BETV / VOO
Carrefour	Google Play
Cora	iTunes
Fnac	Netflix
Mediamarkt	Proximus
Standaard Boekhandel	Telenet

Share of European market 2020



Physical retail
1.9%



Physical rental
1.0%



Digital video (OTT)
1.5%



Pay TV TVOD
7.2%

Average home entertainment spending



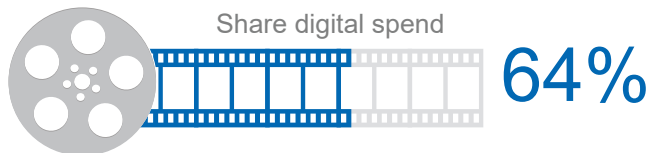
Spending per TV household (EURO)
€70.9



Spending per broadband household (EURO)
€92.7



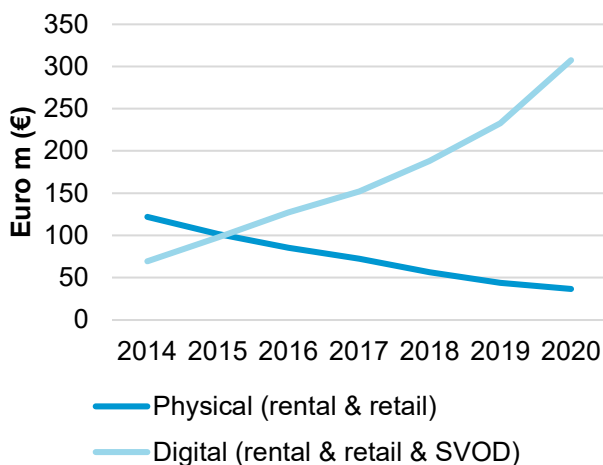
Digital share of spend vs. broadband speed



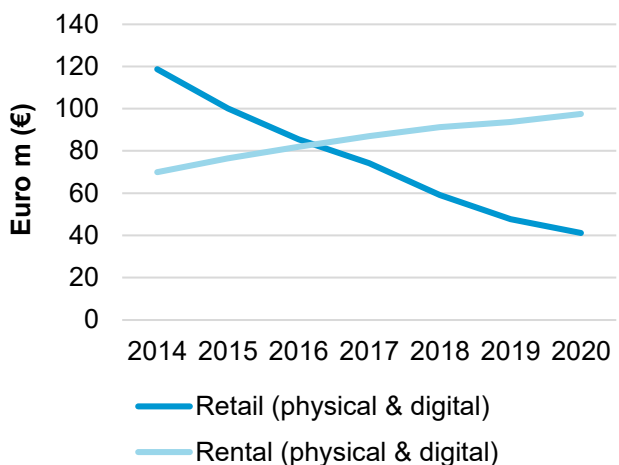
Broadband connections speed rank
(ranked across the 9 IVF countries)

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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