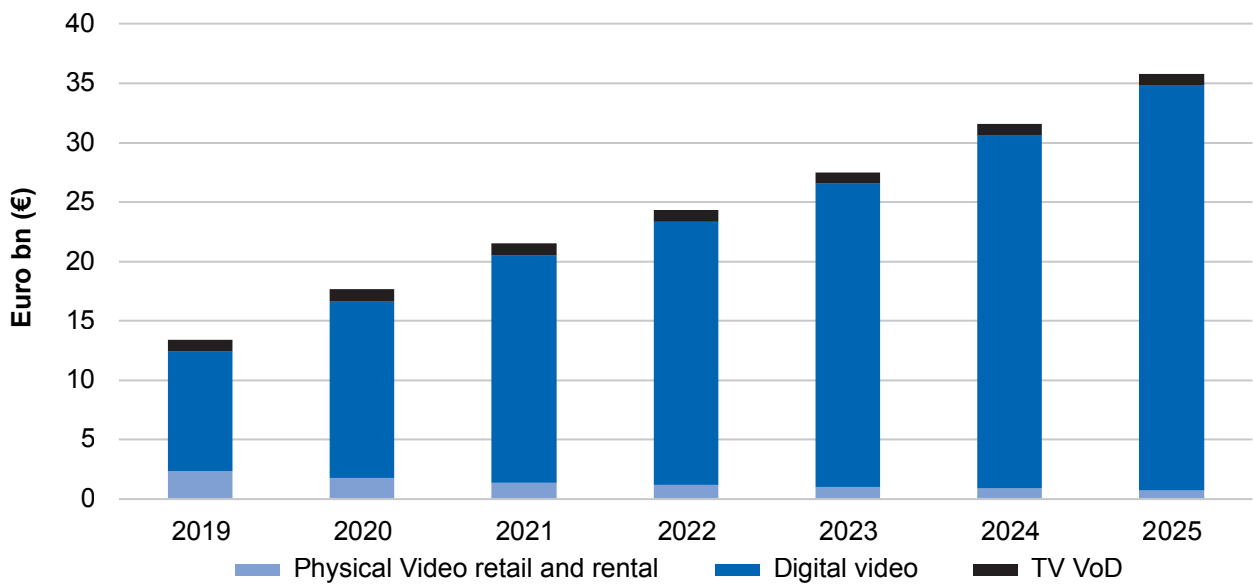


Total Europe

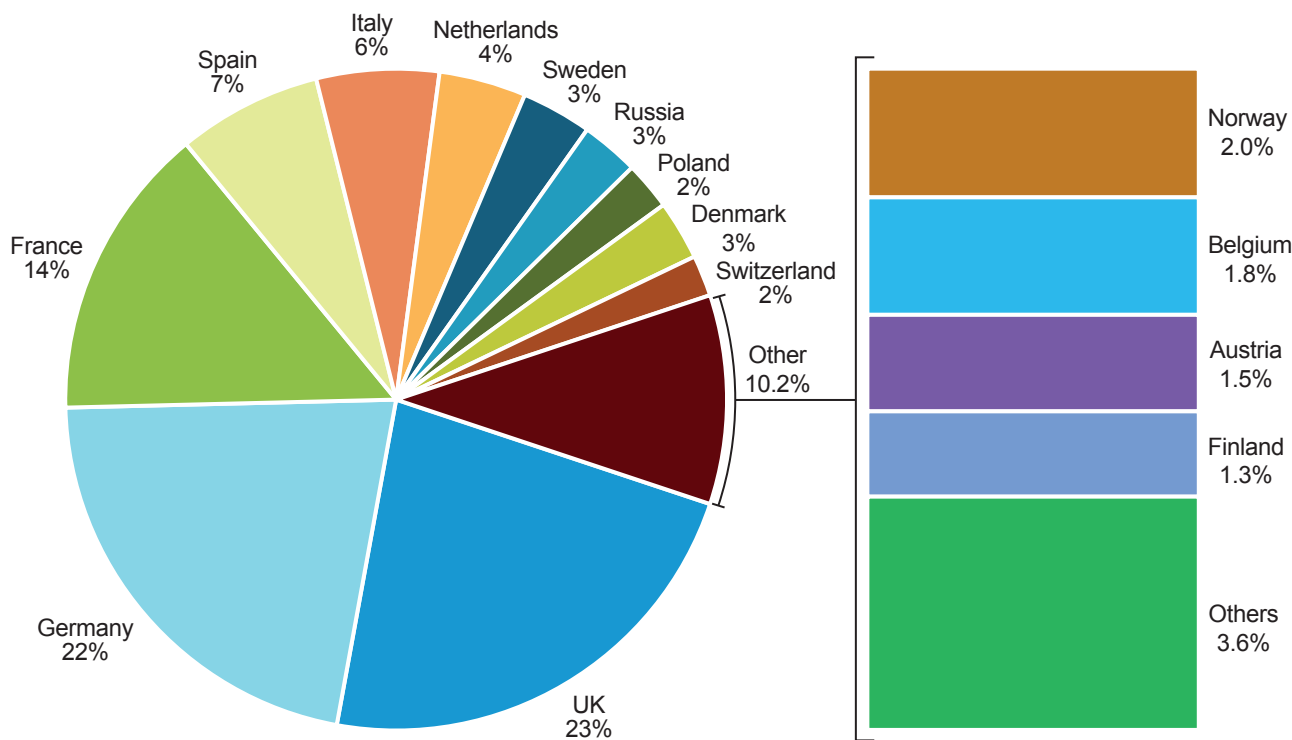
Total Europe: key data 2025

Population (m)	640.9	Consumer spending on digital video and TV VoD (€m)	35,075.6
TV households (m)	264.5	Comparison with 2024	14.3%
Consumer spending on total video (€m)	35,795.1	Consumer spending on physical video software (€m)	719.5
Comparison with 2024	13.3%	Comparison with 2024	-21.0%

Consumer spending by segment



Total Europe share on total consumer spending on all video by countries



Video market: Europe

	2019	2020	2021	2022	2023	2024	2025	24/25
GENERAL								
Population (m)	638.1	638.8	638.7	640.6	642.5	642.2	640.9	-0.2%
TV households (m)	258.5	259.6	259.4	260.4	262.9	264.1	264.5	0.2%
DVD Video player/recorder penetration (%)	60.9	58.7	56.8	54.8	52.6	50.9	48.8	-4.1%
Blu-ray Disc player/recorders penetration (%)	22.3	21.6	21.0	20.2	19.4	18.7	18.2	-3.1%
OTT Subscriptions (m)	121.6	194.5	241.6	286.1	317.9	344.2	371.2	7.8%

Total video software market

	2018	2019	2020	2021	2022	2023	2024	23/24
CONSUMER LEVEL ALL VIDEO								
<i>Total market figures include consumption of both physical and digital video</i>								
Total spending on video (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								
<i>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.</i>								
Total retail digital video (EUR m)	768.1	884.7	788.9	848.3	887.4	899.4	910.9	1.3%
Total rental digital video (EUR m)	499.6	680.1	655.8	571.7	578.3	584.2	602.6	3.1%
Total subscription digital video (EUR m)	8,808.9	13,254.5	17,701.1	20,722.9	24,060.9	28,246.4	32,616.2	15.5%
Total spending on digital video (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								
<i>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.</i>								
Pay TV TVOD (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								
<i>Total market figures include consumption of legacy formats not broken out separately (eg. VHS, HD-DVD, UMD) where relevant.</i>								
Physical video rental (EUR m)	109.5	66.9	43.3	30.1	21.8	16.2	11.6	-28.6%
Physical video retail (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)	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 be possible to compare directly to figures published after this date. 4) Total Europe includes 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.