France

France key data 2022

Population (m)	65.6
TV households (m)	28.7
Consumer spending on total video (€m)	3,146.8
Comparison with 2021	10.9%
Consumer spending on digital video and TV VoD (€m)	2,923.3
Comparison with 2021	12.9%
Consumer spending on physical video software (€m)	223.5
Comparison with 2021	-9.9%

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%

France key commentary

Market developments

The French video market experienced a 10.9% growth in consumer spending on video software (physical carriers and online) in 2022 compared to 2021. The total French video market now represents a value of around EUR 3,1 billion.

In 2022, the French DVD/Blu-Ray market contracted by 9.9% in value compared to 2021, closing at EUR 223.5 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.

The online market experienced healthy performance in 2022, in particular as regards SVOD services, contributing to offsetting the declining market performance of the physical formats.

Other relevant developments

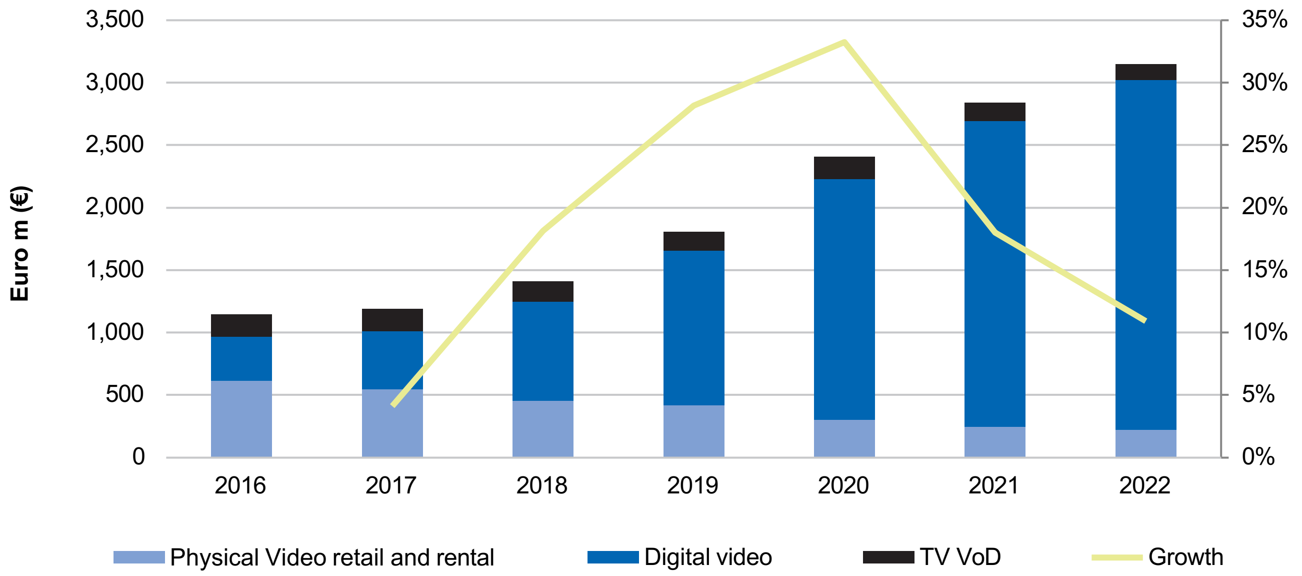
In France, DEGI and SEVN confirmed the return the “VODays” consumer campaign in January 2023. This initiative brought to the market a week-long digital campaign across ten of the top digital retailer platforms in France offering audiences a selection of new and popular films at promotional prices across both sell-through and rental options.

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

Video market: France

	2016	2017	2018	2019	2020	2021	2022	21/22
GENERAL								
Population (m)	64.7	64.8	65.0	65.1	65.3	65.4	65.6	0.2%
TV households (m)	27.7	27.9	28.0	28.2	28.4	28.6	28.7	0.6%
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)	23.7	24.3	24.9	25.5	26.2	27.0	27.4	1.6%
Nominal GDP (EUR m)	2,232.4	2,298.6	2,362.4	2,426.9	2,255.6	2,396.6	2,517.6	5.0%
Consumer price index (100 in 2010)	100.0	103.1	110.3	105.9	107.9	110.6	112.7	1.9%
DVD Video player/recorder penetration (%)	71.0	70.0	69.2	68.5	67.8	66.8	65.8	-1.5%
Blu-ray Disc player/recorders penetration (%)	22.6	23.0	22.7	22.0	21.1	20.0	19.1	-4.7%
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)	2.5	4.8	8.3	12.1	21.0	24.6	28.4	15.5%

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)	1,144.2	1,191.4	1,407.7	1,804.2	2,404.3	2,837.6	3,146.8	10.9%
Growth (%)		4.1%	18.2%	28.2%	33.3%	18.0%	10.9%	
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 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.								
Retail digital video (EUR m)	75.4	87.4	108.3	128.8	160.0	156.8	170.0	8.4%
Rental digital video (EUR m)	61.6	68.6	59.1	53.4	57.5	46.0	48.6	5.8%
Subscription digital video (EUR m)	211.1	313.0	622.3	1,050.9	1,706.9	2,241.9	2,577.5	15.0%
Total digital video (EUR m)	348.1	469.0	789.7	1,233.1	1,924.4	2,444.7	2,796.1	14.4%
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)	179.9	177.4	163.7	149.7	174.7	144.8	127.2	-12.1%
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)	11.4	8.3	5.6	4.0	2.7	2.6	1.9	-26.9%
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)	604.8	536.6	448.6	417.4	302.6	245.5	221.6	-9.7%
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)	616.1	544.9	454.3	421.4	305.2	248.2	223.5	-9.9%
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
Auchan	Canal VOD
Carrefour	Google
Cultura	iTunes
DS	Orange
Fnac	SFR
Leclerc	

Share of European market 2022

Digital video (OTT)
13.3%

Pay TV TVOD
11.7%

Physical retail
19.5%

Physical rental
6.3%

Average home entertainment spending

Spending per TV household (EURO)
€109.5

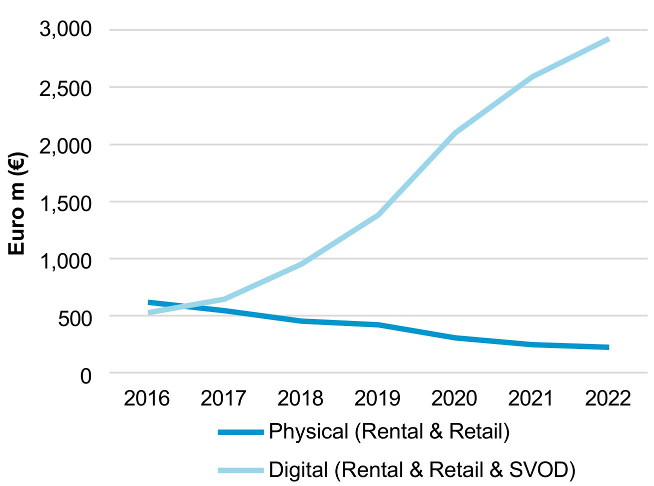
Spending per broadband household (EURO)
€114.9

Digital share of spend vs. broadband speed

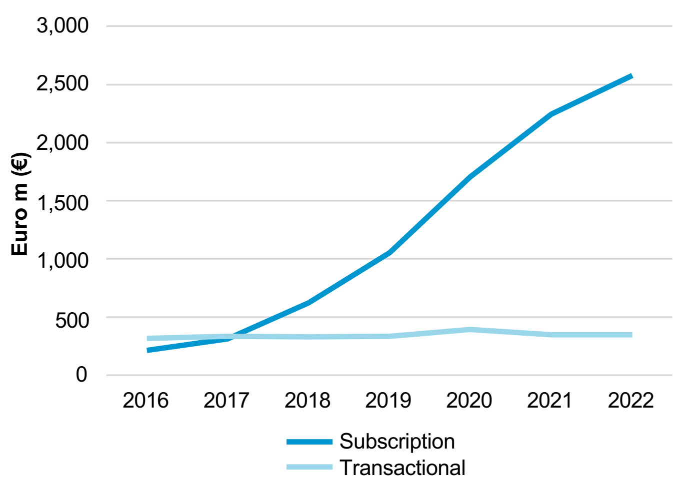
Share digital spend
89%

Broadband subscriptions speed rank
(ranked across the 9 IVF countries)*
#1/2

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