Germany

Germany key data 2021

Population (m)	83.9
TV households (m)	40.9
Consumer spending on physical video software (€m)	427.1
Comparison with 2020	-24.8%
Consumer spending on physical video software (€m) - Total Europe	1,434.0
Comparison with 2020	-21.8%
Consumer spending on digital video and TV VoD (€m)	4,221.2
Comparison with 2020	21.6%
Consumer spending on digital video and TV VoD (€m) - Total Europe	19,298.5
Comparison with 2020	22.9%
Consumer spending on total video (€m)	4,648.3
Comparison with 2020	15.1%
Consumer spending on total video (€m) - Total Europe	20,732.5
Comparison with 2020	18.2%

Germany key commentary

Market developments

In 2021, the German market for copyright works was again positively affected by the global COVID-19 pandemic; German consumer spending on various forms of copyright media content and services (cinema, home entertainment, music, games and books) showed a double-digit growth.

The German home entertainment market experienced another record year despite the pandemic driven reduction of new title releases (a decrease of 36% compared to 2020). The highest turnover ever of EUR 2,9 billion in consumer spending was driven by the strong performance of digital distribution, especially SVOD services, showing an increase of consumer spending of 32% and 7,5 million additional subscriptions compared to 2020.

Consumer spending on digital access and services (TVOD and EST) slightly decreased but is still at a level of almost EUR 0.5 billion. While this market segment remains healthy, the lack of new titles significantly resulted in a shortfall.

The German market for physical carries continued to decline, representing a market share of 15 % of the total German video market in 2021, and a decline in consumer spending of 25 %. Part of this decline can also be attributed to the absence of new title releases.

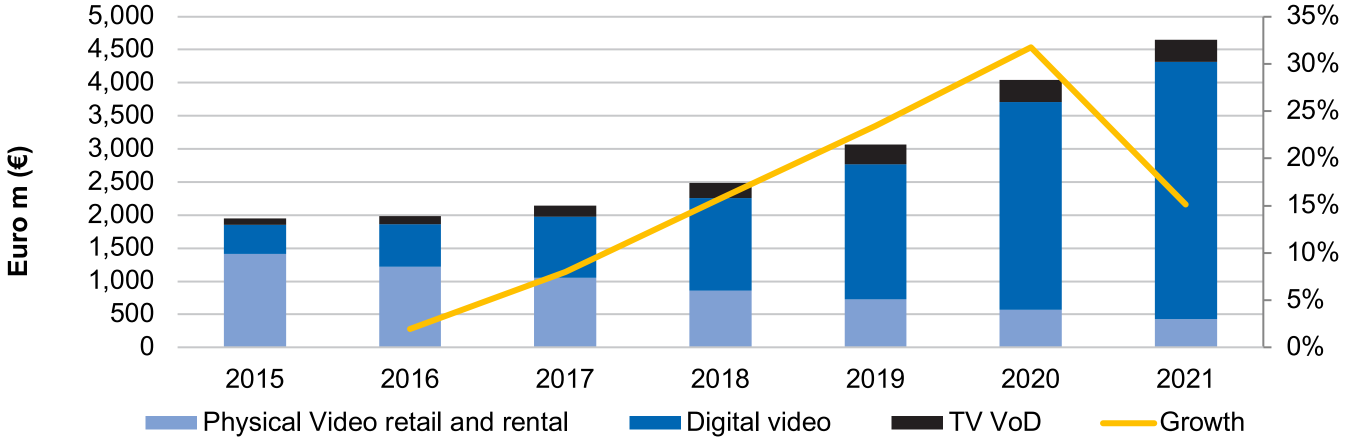
Overall, 25 million consumers purchased or rented a DVD/Blu-ray or engaged in sell-through EST/TVOD in Germany in 2021, representing 38% of the German population.

Since 2009, the share of digital distribution in the German home entertainment market has increased from 1% to 86%.

The best-selling title on DVD and Blu Ray in 2021 was NO TIME TO DIE. The best-selling local title was JIM KNOPF & DIE WILDE 13.

This commentary was provided by the BVV, the German Video Association.

Consumer spending by segment



Source: Omdia

Video market: Germany

	2015	2016	2017	2018	2019	2020	2021	20/21
GENERAL								
Population (m)	81.8	82.2	82.7	83.1	83.5	83.8	83.9	0.1%
TV households (m)	39.6	39.8	40.1	40.2	40.5	40.8	40.9	0.4%
Population Total Europe (m)	629.4	631.1	632.8	634.4	635.7	636.7	637.3	0.1%
TV households Total Europe (m)	258.6	260.2	262.1	263.8	265.7	267.6	269.2	0.6%
Broadband households (m)	28.0	28.4	29.6	30.5	31.1	32.4	33.5	3.7%
Nominal GDP (EUR m)	3,022.9	3,128.7	3,263.3	3,360.8	3,454.7	3,319.2	3,458.2	4.2%
Consumer price index (100 in 2010)	100.0	100.1	103.7	110.8	106.5	108.3	112.0	3.4%
DVD Video player/recorder penetration (%)	57.5	54.6	50.0	46.1	43.0	40.5	38.4	-5.2%
Blu-ray Disc player/recorders penetration (%)	23.9	24.7	24.8	24.2	23.0	21.8	20.7	-5.2%
DVD Video player/recorder Total Europe (%)	69.4	67.0	64.4	61.7	59.2	56.9	54.7	-3.8%
Blu-ray Disc player/recorders penetration Total Europe (%)	20.7	21.8	22.3	22.3	21.7	21.0	20.2	-3.8%
OTT Subscriptions (m)	5.3	8.4	12.9	18.9	25.8	39.3	43.9	11.6%

Total video software market

	2015	2016	2017	2018	2019	2020	2021	20/21
CONSUMER LEVEL ALL VIDEO								
Total market figures include consumption of both physical and digital video								
Total spending on video (EUR m)	1,950.0	1,987.8	2,146.2	2,483.4	3,065.0	4,038.5	4,648.3	15.1%
Growth (%)		1.9%	8.0%	15.7%	23.4%	31.8%	15.1%	
Total spending on video Total Europe (EUR m)	9,122.1	9,206.7	9,929.1	11,464.3	13,421.5	17,538.9	20,732.5	18.2%
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)	165.0	104.7	72.4	48.5	42.1	26.4	13.7	-48.0%
Physical video rental Total Europe (EUR m)	431.3	295.4	214.6	150.2	115.8	77.0	53.0	-31.2%
Physical video retail (EUR m)	1,248.2	1,112.5	984.0	807.5	689.7	541.8	413.3	-23.7%
Physical video retail Total Europe (EUR m)	4,736.9	3,892.9	3,295.0	2,681.6	2,199.6	1,757.5	1,381.0	-21.4%
Physical video software (EUR m)	1,413.2	1,217.2	1,056.4	856.0	731.8	568.2	427.1	-24.8%
Physical video software Total Europe (EUR m)	5,168.2	4,188.3	3,509.7	2,831.7	2,315.4	1,834.5	1,434.0	-21.8%
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)	101.3	117.8	155.4	194.8	239.7	283.3	269.3	-4.9%
Rental digital video (EUR m)	95.4	103.5	124.8	141.7	149.8	207.7	213.5	2.8%
Subscription digital video (EUR m)	243.3	424.2	643.1	1,061.7	1,647.1	2,644.9	3,405.8	28.8%
Total digital video (EUR m)	440.1	645.6	923.4	1,398.3	2,036.5	3,135.9	3,888.6	24.0%
Total digital video Total Europe (EUR m)	3,046.1	4,076.2	5,394.8	7,557.9	9,980.3	14,491.3	18,137.9	25.2%
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)	96.7	125.0	166.3	229.0	296.7	334.4	332.6	-0.5%
Pay TV TVOD Total Europe (EUR m)	907.7	942.2	1,024.7	1,074.6	1,125.7	1,213.1	1,160.7	-4.3%

*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 2022. 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. **6)** Subscription digital video figures are according to Omdia and may differ from BVV's other sources.*

Source: Omdia

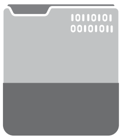
Key players in the market (in alphabetical order)

Physical	Digital
Amazon	Amazon (transactional + subscriptional)
Media Markt	iTunes (transactional)
Müller Drugstores	Maxdome (transactional + subscriptional)
Saturn	Netflix (subscriptional)
Thalia	Sky (transactional + subscriptional)

Share of European market 2021

Physical retail
29.9%

Physical rental
25.9%

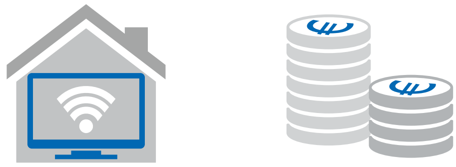


Digital video (OTT)
21.4%

Pay TV TVOD
28.7%

Average home entertainment spending

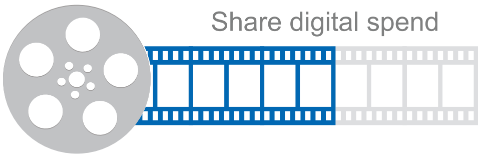
Spending per TV household (EURO)
€113.6



Spending per broadband household (EURO)
€138.6

Digital share of spend vs. broadband speed

Share digital spend



84%

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

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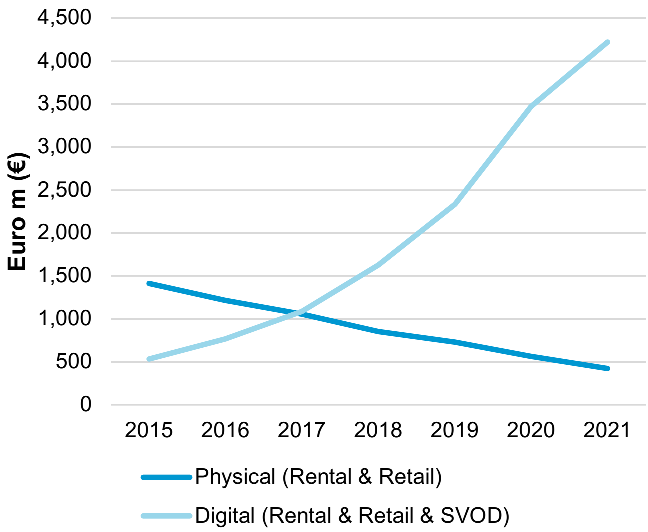
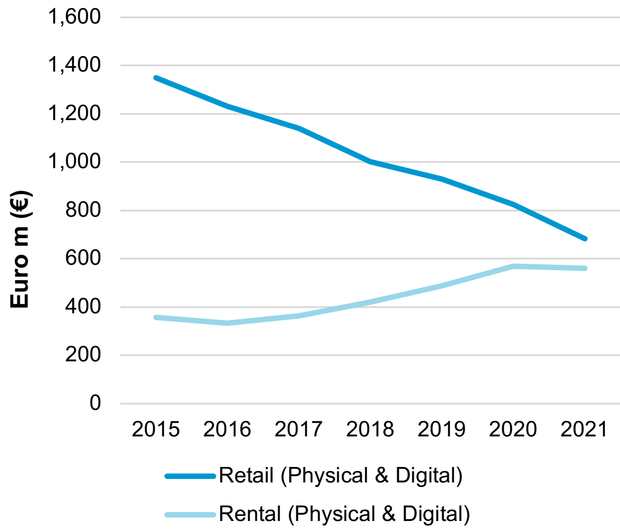
Comparison Physical vs Digital



Comparison Retail vs Rental



Note: Digital (Rental & Retail) includes SVOD data; Rental (Physical & Digital) excludes SVOD data

Source: Omdia