Germany

Germany: key data 2023

Population (m)	83.8
TV households (m)	41.1
Consumer spending on total video (€m)	5,347.0
Comparison with 2022	12.8%
Consumer spending on digital video and TV VoD (€m)	5,045.5
Comparison with 2022	14.9%
Consumer spending on physical video software (€m)	301.4
Comparison with 2022	-13.5%

Consumer spending on total video (€m) - Total Europe	26,435.1
Comparison with 2022	12.1%
Consumer spending on digital video and TV VoD (€m) - Total Europe	25,419.9
Comparison with 2022	13.4%
Consumer spending on physical video software (€m) - Total Europe	1,015.2
Comparison with 2022	-12.9%

Germany key commentary

Market developments

In 2023, the German home entertainment market (physical and digital including SVOD) increased by 10% to EUR 3,4 billion in consumer spending. This marks another record year and indicates an increase of 10% compared to 2022.

25,9 million consumers purchased or rented a DVD/Blu-ray or engaged in sell-through EST/TVOD transactions in Germany in 2023, representing 39% of the population. The average spending per consumer reached 132 Euros in 2023. Compared to 2022, the consumer engagement has slightly increased.

Digital distribution via SVOD services, continued to be the strongest segment in the home entertainment market with EUR 2,6 billion. SVOD grew by 13% compared to 2022 and accounts for 77% of consumer spending.

Consumer spending on digital access and services (TVOD and EST) increased by 9% to almost EUR 0,5 billion, representing a 14% market share. EST increased by 11%, representing 8% of the market whereas TVOD increased by 5% (5% of market) compared to 2022.

The German market for physical carriers continued to contract, representing a market share of 9% of the total German video market in 2023, and a decline in consumer spending of 14%.

The overall economic situation in Germany was slightly better than a year ago. However, the comparably high inflation and remaining uncertainty hindered consumers' willingness to buy home entertainment content.

Compared to the pre-pandemic year 2019, the German home entertainment market increased by 50% in consumer spending. SVOD increased by 122%, digital transactional spend increased by 21% and physical transactional spend decreased by 57%.

The best-selling title on DVD and Blu Ray in 2022 was "AVATAR: THE WAY OF WATER." The best-selling local title was "DIE SCHULE DER MAGISCHEN TIERE 2".

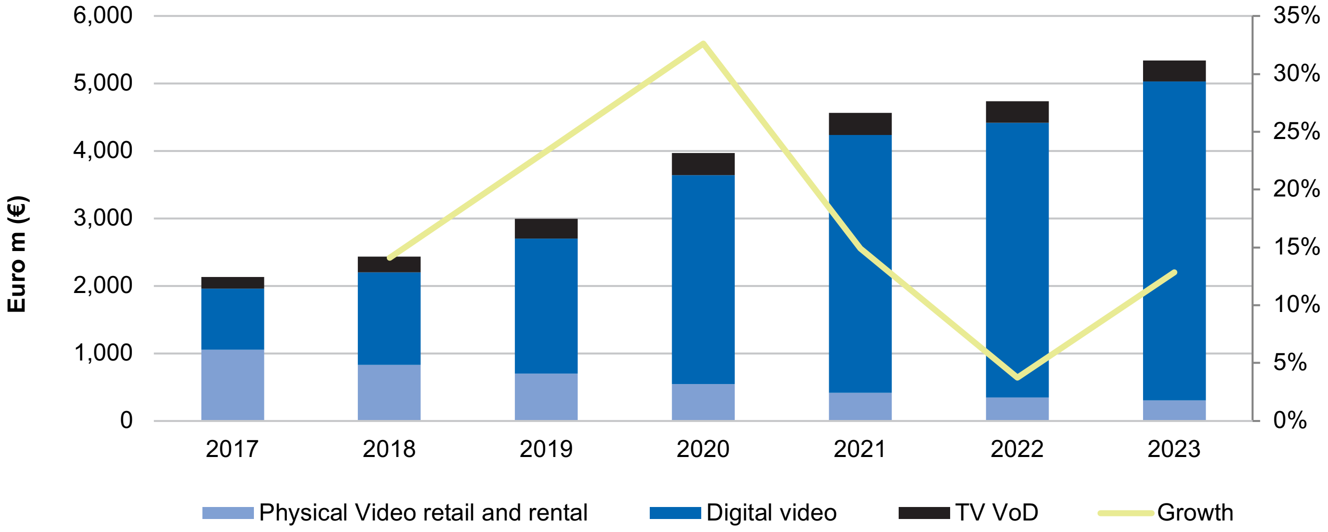
This commentary was provided by the AllScreens, the German Theatrical Distribution and Video Association.

Video market: Germany

	2017	2018	2019	2020	2021	2022	2023	22/23
GENERAL								
Population (m)	82.7	83.1	83.5	83.8	83.9	83.9	83.8	-0.1%
TV households (m)	40.1	40.2	40.5	40.8	40.9	41.0	41.1	0.1%
Population Total Europe (m)	632.8	634.4	635.7	636.7	637.3	637.7	637.8	0.0%
TV households Total Europe (m)	262.1	263.8	265.7	267.6	269.2	270.7	272.2	0.5%
Broadband households (m)	30.1	31.1	32.0	32.9	33.5	34.2	34.5	1.0%
Nominal GDP (EUR m)	3,263.3	3,360.8	3,454.7	3,319.2	3,458.2	3,630.6	3,745.5	3.2%
Consumer price index (100 in 2010)	103.7	110.8	106.5	108.3	112.0	114.6	120.4	5.1%
DVD Video player/recorder penetration (%)	50.0	46.1	43.0	40.5	38.4	36.6	35.2	-3.9%
Blu-ray Disc player/recorders penetration (%)	24.8	24.2	23.0	21.8	20.7	19.6	18.7	-4.3%
DVD Video player/recorder Total Europe (%)	64.4	61.7	59.2	56.9	54.7	52.7	50.8	-3.6%
Blu-ray Disc player/recorders penetration Total Europe (%)	22.3	22.3	21.7	21.0	20.2	19.4	18.7	-3.7%
OTT Subscriptions (m)	12.8	18.7	25.6	38.4	43.6	46.9	50.8	8.4%

Source: Omdia

Consumer spending by segment



Total video software market

	2017	2018	2019	2020	2021	2022	2023	22/23
CONSUMER LEVEL ALL VIDEO								
Total market figures include consumption of both physical and digital video								
Total spending on video (EUR m)	2,130.3	2,431.0	2,997.4	3,975.3	4,567.2	4,738.7	5,347.0	12.8%
Growth (%)		14.1%	23.3%	32.6%	14.9%	3.8%	12.8%	
Total spending on video Total Europe (EUR m)	9,632.5	11,109.4	13,467.8	17,634.9	21,442.7	23,589.9	26,435.1	12.1%
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)	155.6	194.8	239.6	283.9	268.7	270.5	282.3	4.4%
Rental digital video (EUR m)	124.8	141.7	149.8	208.1	213.1	190.9	194.7	2.0%
Subscription digital video (EUR m)	627.1	1,032.8	1,610.8	2,600.3	3,341.0	3,606.2	4,250.4	17.9%
Total digital video (EUR m)	907.5	1,369.4	2,000.2	3,092.3	3,822.8	4,067.6	4,727.4	16.2%
Total digital video Total Europe (EUR m)	5,241.8	7,357.8	10,111.7	14,741.7	19,007.4	21,355.7	24,389.6	14.2%
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)	166.3	229.1	296.8	334.7	331.0	322.7	318.2	-1.4%
Pay TV TVOD Total Europe (EUR m)	881.1	943.4	1,021.6	1,107.1	1,068.6	1,069.0	1,030.3	-3.6%
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)	72.4	48.5	42.1	26.4	13.7	9.0	5.9	-34.0%
Physical video rental Total Europe (EUR m)	214.6	144.8	109.5	66.9	43.3	30.1	21.8	-27.6%
Physical video retail (EUR m)	984.0	784.1	658.3	521.9	399.7	339.5	295.5	-13.0%
Physical video retail Total Europe (EUR m)	3,295.0	2,663.4	2,225.0	1,719.2	1,323.4	1,135.0	993.4	-12.5%
Physical video software (EUR m)	1,056.4	832.6	700.4	548.3	413.5	348.5	301.4	-13.5%
Physical video software Total Europe (EUR m)	3,509.7	2,808.2	2,334.5	1,786.1	1,366.7	1,165.1	1,015.2	-12.9%

*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, updated data sources and other data restatements. **3)** The current online figures are a snapshot of the market in June 2024. 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, SVOD)	Maxdome (transactional, SVOD)
Apple	Apple TV+	Netflix
Expert	Discovery+	Paramount+
Media Markt	Disney+	Sky (transactional, SVOD)
Müller Drugstores	Google Play	Univercine
Thalia	iTunes (transactional)	

Share of European market 2023

Digital video (OTT)
19.4%

Pay TV TVOD
30.9%

Physical retail
29.7%

Physical rental
27.1%

Average home entertainment spending

Spending per TV household (EURO)
€130.2

Spending per broadband household (EURO)
€155.0

Digital share of spend vs. broadband speed

Share digital spend
88%

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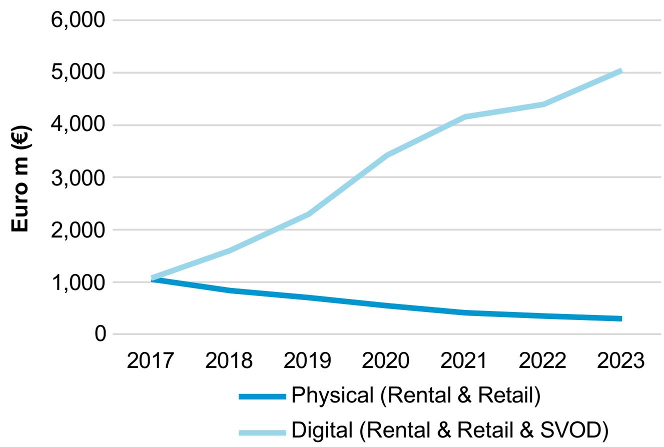
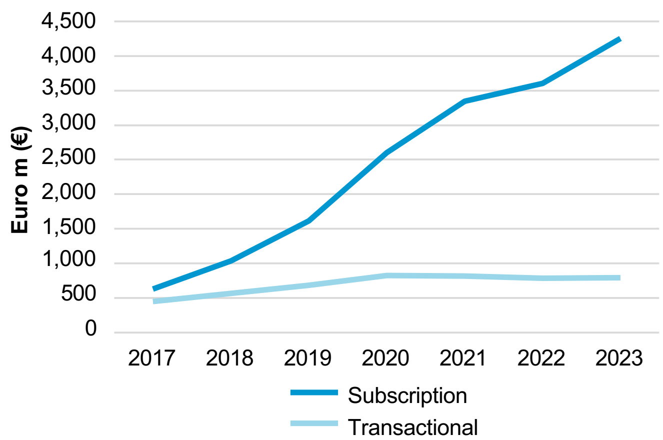
Comparison Physical vs Digital



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