Netherlands

Netherlands key data 2022

Population (m)	17.2
TV households (m)	7.9
Consumer spending on total video (€m)	959.4
Comparison with 2021	7.3%
Consumer spending on digital video and TV VoD (€m)	942.4
Comparison with 2021	8.0%
Consumer spending on physical video software (€m)	17.0
Comparison with 2021	-22.1%

Consumer spending on total video (€m) - Total Europe	23,276
Comparison with 2021	9.4%
Consumer spending on digital video and TV VoD (€m) - Total Europe	22,111
Comparison with 2021	11.1%
Consumer spending on physical video software (€m) - Total Europe	1,165.6
Comparison with 2021	-14.7%

Netherlands key commentary

Netherlands 2022

2022 was the year of recovery for the Dutch film and audiovisual industry. The year initially got off to a rocky start with yet another lockdown. But at the end of February, all obstructing measures in relation to the COVID-19 pandemic were withdrawn, which led to a significant increase in cinema attendance. Alongside the return of many cinemagoers, the online distribution of films and audiovisual content showed growth yet again in 2022. However, the growth rate is slowing down.

Online distribution

The online distribution of films and audiovisual content has been the most important way for Dutch audiences to watch films and audiovisual content. The online market is still dominated by Subscription Video on Demand (SVOD). The Dutch SVOD market showed an increase of 9% in value in comparison with 2021, thus experiencing more modest growth than in previous years. This might be a sign that the market is slowly getting saturated. The fact that many services are struggling to attract significantly more members supports this presumption. Netflix remains the most popular SVOD service in the Netherlands, followed by Videoland and Disney+.

The online transactional market (Pay TV TVOD) also showed growth, although marginal with 1%. The return of many major films to be shown in cinemas may have played a role in this very modest growth rate as Dutch audiences had more options watching the latest films, including at cinemas. Long-term sales in the transactional market showed slow but steady growth. Pathé Thuis remains the most used service in the Netherlands for TVOD access.

Physical market

Despite the reopening of physical stores at the beginning of 2022, the sales of films and audiovisual content on DVD and Blu-ray continued to decline in the Netherlands. The fact that more and more distributors move away from releasing films or audiovisual content on physical carriers exacerbates this development. Looking at the past five years, the value of the Dutch market for DVDs and Blu-ray has decreased by 71%.

A look at the future

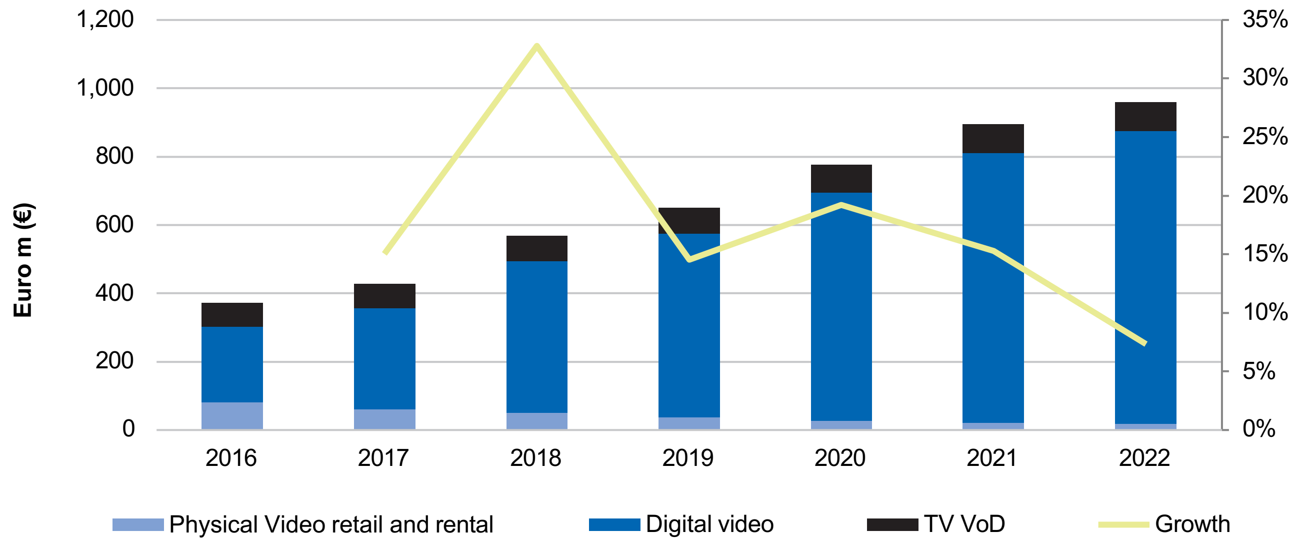
After the COVID-19 pandemic, it was anticipated that the Dutch film and audiovisual industry would have plenty of room to grow again, but it seems that it might encounter new challenges in the coming years. Due to the current uncertain economic situation, consumers are becoming more careful about how they spend their money, and this could have a significant impact on the film- and audiovisual industry. In addition, as mentioned above, there are more and more signs that the Dutch SVOD market is getting saturated. Already existing and especially new SVOD services are beginning to see challenges in attracting new subscribers. It seems that Dutch consumers are not willing to subscribe to more than two services on average in total. The role of the online transactional market is likely to remain stable and will likely be chosen by Dutch consumers as an additional option next to SVOD services. The physical market is expected to continue to contract and form a niche market in the Dutch territory and/or will cease as more and more distributors are limiting physical releases or even abstain from them.

This commentary was provided by FDN, the Dutch Film Distributors Association.

Video market: Netherlands

	2016	2017	2018	2019	2020	2021	2022	21/22
GENERAL								
Population (m)	17.0	17.0	17.1	17.1	17.1	17.2	17.2	0.2%
TV households (m)	7.6	7.7	7.8	7.8	7.9	7.9	7.9	0.5%
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)	6.1	6.2	6.5	6.6	6.7	6.8	6.9	1.5%
Nominal GDP (EUR m)	708.3	738.8	774.3	810.2	792.1	814.1	855.2	5.1%
Consumer price index (100 in 2010)	99.8	103.0	109.7	106.8	109.4	113.0	115.5	2.2%
DVD Video player/recorder penetration (%)	39.1	34.1	29.6	26.1	23.1	20.5	18.3	-10.9%
Blu-ray Disc player/recorders penetration (%)	19.9	19.4	19.1	18.5	17.9	17.4	16.6	-4.1%
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)	2.3	3.0	4.0	5.1	6.9	7.8	10.0	28.9%

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)	371.8	427.8	567.9	650.5	775.5	894.0	959.4	7.3%
Growth (%)		15.1%	32.8%	14.5%	19.2%	15.3%	7.3%	
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 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)	7.8	9.0	10.3	11.5	13.0	13.3	14.0	5.0%
Rental digital video (EUR m)	5.6	6.3	7.0	7.8	11.7	14.5	8.9	-38.7%
Subscription digital video (EUR m)	208.6	282.2	427.6	518.0	642.0	760.3	834.5	9.8%
Total digital video (EUR m)	222.0	297.5	444.9	537.3	666.7	788.1	857.4	8.8%
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)	68.8	70.2	73.7	76.2	80.5	84.2	85.0	1.0%
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)	2.0	1.2	0.7	0.3	0.2	0.1	0.1	-34.8%
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)	79.0	58.9	48.6	36.7	28.2	21.7	16.9	-22.0%
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)	81.0	60.1	49.3	37.0	28.3	21.8	17.0	-22.1%
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%

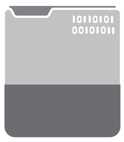
*Notes: **1)** Consumer level digital video (OTT) and pay TV transactional VOD figures may differ from locally published figures due to the application of different definitions. **2)** Historical numbers in this section may differ from those published in previous years owing to changes in Omdia methodology, 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	TVOD	SVOD
Bol.com	KPN OnDemand	Disney+
MediaMarkt	Pathe Thuis	HBO Max
	Ziggo Movies & Series	Netflix
		Viaplay
		Videoland

Share of European market 2022



Digital video (OTT)
4.1%

Pay TV TVOD
7.8%

Physical retail
1.5%

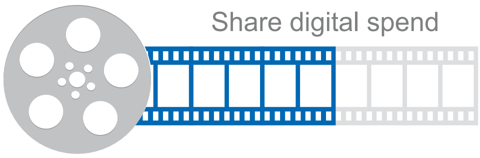
Physical rental
0.2%

Average home entertainment spending

Spending per TV household (EURO)
€120.8

Spending per broadband household (EURO)
€139.5

Digital share of spend vs. broadband speed



Share digital spend
89%

Broadband subscriptions speed rank
(ranked across the 9 IVF countries)*

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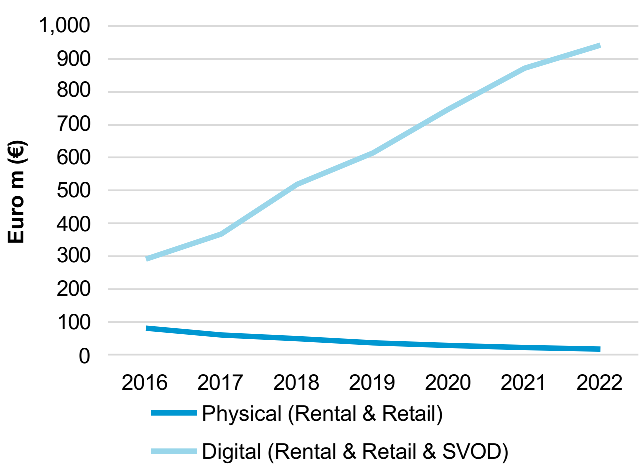
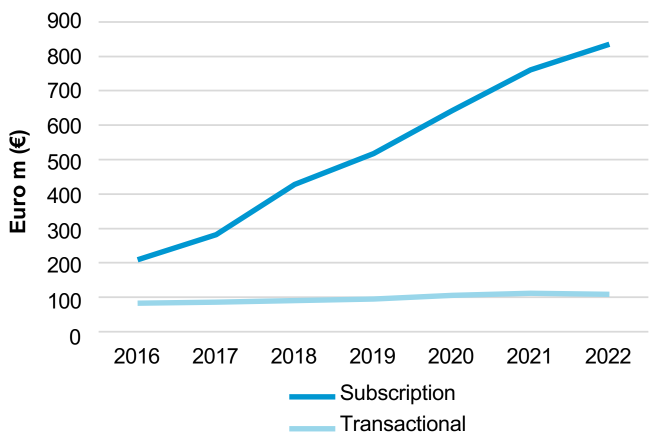
Comparison Physical vs Digital



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