Germany

Germany key data 2022

Population (m)	83.9
TV households (m)	41.0
Consumer spending on total video (€m)	4,808.7
Comparison with 2021	4.0%
Consumer spending on digital video and TV VoD (€m)	4,460.2
Comparison with 2021	6.0%
Consumer spending on physical video software (€m)	348.5
Comparison with 2021	-15.7%

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%

Germany key commentary

Market developments

In 2022, the German home entertainment market (physical and digital) experienced another record year reaching for the first time more than EUR 3 billion in consumer spending, indicating an increase of 7% compared to 2022.

25,2 million consumers purchased or rented a DVD/Blu-ray or engaged in sell-through EST/TVOD transactions in Germany in 2022, representing 38% of the population. The average spending per consumer reached 123 Euros in 2022.

Digital distribution, especially SVOD services, was again the strongest segment in the home entertainment market with EUR 2,3 billion, representing 75% of consumer spending. With an increase of 12%, the SVOD sector showed a contracting but still double-digit growth rate compared to the previous year.

Consumer spending on digital access and services (TVOD and EST) increased by 4% to almost EUR 0,5 billion, representing a 14% market share. EST has been stable whereas TVOD increased by 13% compared to 2021.

The German market for physical carriers continued to contract, representing a market share of 11% of the total German video market in 2022, and a decline in consumer spending of 15%.

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

The overall economic situation with a high degree of uncertainty and a high inflation rate has an increasingly negative impact on consumers’ willingness to buy home entertainment content.

The best-selling title on DVD and Blu Ray in 2022 was TOP GUN MAVERICK. The best-selling local title was DIE SCHULE DER MAGISCHEN TIERE.

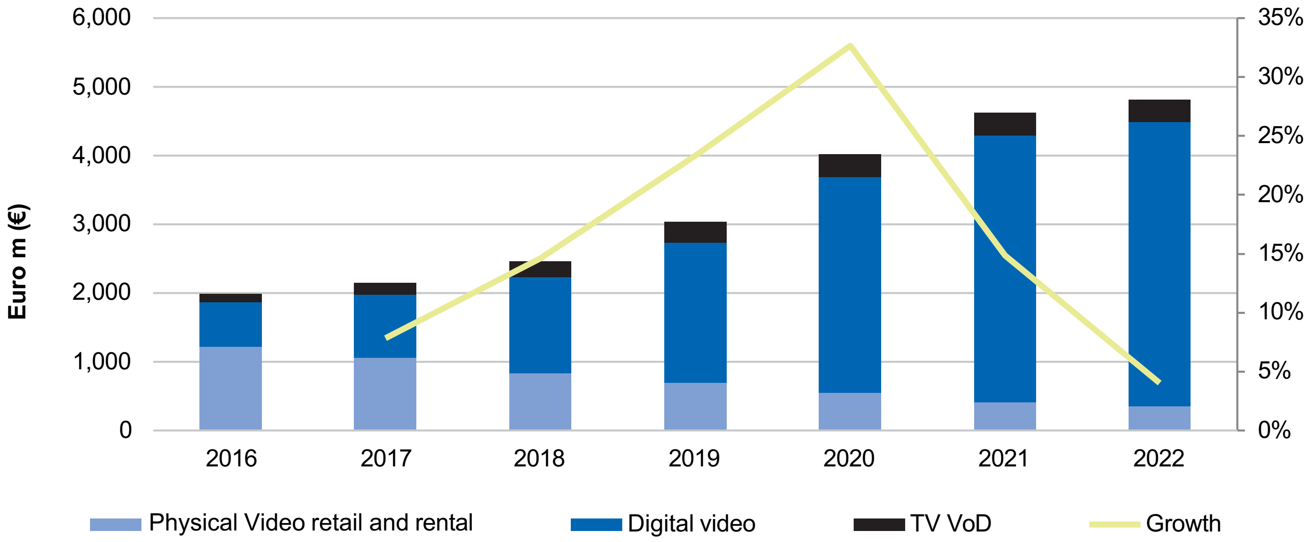
This commentary was provided by the BVV, the German Video Association.

Video market: Germany

	2016	2017	2018	2019	2020	2021	2022	21/22
GENERAL								
Population (m)	82.2	82.7	83.1	83.5	83.8	83.9	83.9	0.0%
TV households (m)	39.8	40.1	40.2	40.5	40.8	40.9	41.0	0.2%
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)	28.2	30.1	31.1	32.0	32.9	33.5	34.2	1.9%
Nominal GDP (EUR m)	3,128.7	3,263.3	3,360.8	3,454.7	3,319.2	3,458.2	3,630.6	5.0%
Consumer price index (100 in 2010)	100.1	103.7	110.8	106.5	108.3	112.0	114.6	2.3%
DVD Video player/recorder penetration (%)	54.6	50.0	46.1	43.0	40.5	38.4	36.6	-4.6%
Blu-ray Disc player/recorders penetration (%)	24.7	24.8	24.2	23.0	21.8	20.7	19.6	-5.2%
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)	8.4	12.9	18.9	25.8	38.7	43.9	48.0	9.4%

Source: Omdia

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)	1,990.0	2,146.2	2,460.0	3,033.9	4,024.1	4,622.1	4,808.7	4.0%
Growth (%)		7.8%	14.6%	23.3%	32.6%	14.9%	4.0%	
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)	120.0	155.4	194.8	239.7	283.9	268.7	269.9	0.4%
Rental digital video (EUR m)	103.5	124.8	141.7	149.8	208.1	213.1	190.2	-10.7%
Subscription digital video (EUR m)	424.2	643.2	1,061.8	1,647.3	2,649.1	3,395.8	3,677.4	8.3%
Total digital video (EUR m)	647.8	923.4	1,398.4	2,036.7	3,141.1	3,877.6	4,137.5	6.7%
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)	125.0	166.3	229.1	296.8	334.7	331.0	322.7	-2.5%
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)	104.7	72.4	48.5	42.1	26.4	13.7	9.0	-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)	1,112.5	984.0	784.1	658.3	521.9	399.7	339.5	-15.1%
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)	1,217.2	1,056.4	832.6	700.4	548.3	413.5	348.5	-15.7%
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.*
***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 2022

Digital video (OTT)
19.7%

Pay TV TVOD
29.6%

Physical retail
29.9%

Physical rental
29.3%

Average home entertainment spending

Spending per TV household (EURO)
€117.2

Spending per broadband household (EURO)
€140.8

Digital share of spend vs. broadband speed

Share digital spend
86%

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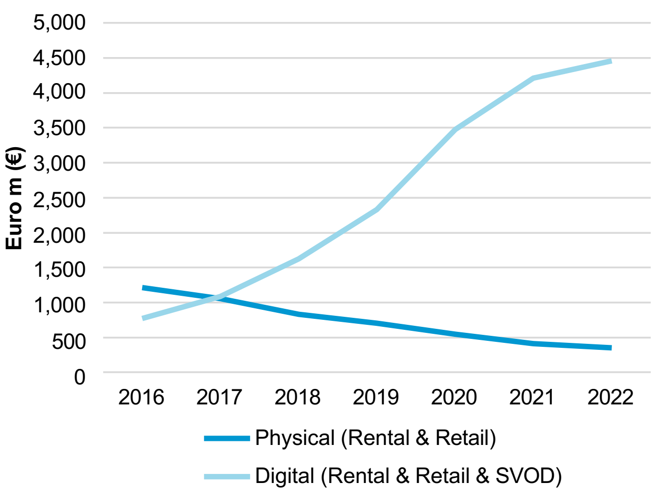
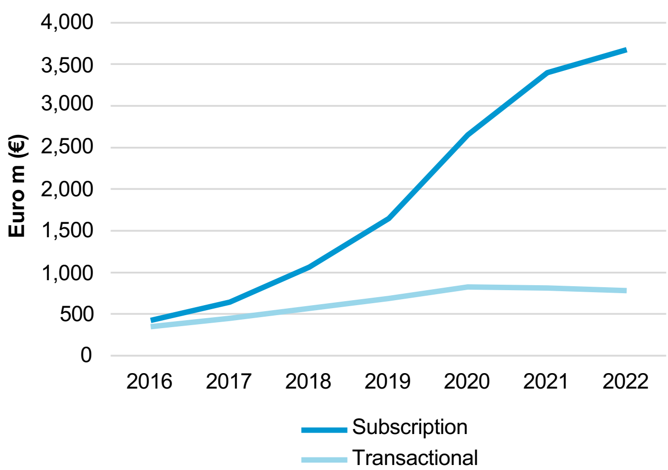
Comparison Physical vs Digital



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