Netherlands

Netherlands: key data 2023

Population (m)	17.2
TV households (m)	8.0
Consumer spending on total video (€m)	1,181.2
Comparison with 2022	13.8%
Consumer spending on digital video and TV VoD (€m)	1,167.4
Comparison with 2022	14.3%
Consumer spending on physical video software (€m)	13.8
Comparison with 2022	-18.6%

Consumer spending on total video (€m) - Total Europe	26,435
Comparison with 2022	12.1%
Consumer spending on digital video and TV VoD (€m) - Total Europe	25,420
Comparison with 2022	13.4%
Consumer spending on physical video software (€m) - Total Europe	1,015.2
Comparison with 2022	-12.9%

Netherlands key commentary

Netherlands 2023

The popularity of film and audiovisual content distribution continues to rise in the Netherlands. Consumer spending increased by 14% in 2023. However, in the long term, this growth appears to be slowing down. In 2023, cinemas also had a successful year. 2023 was the first year without any COVID-19 restrictions, leading to good results for movie theaters. The enormous popularity of “Barbie” and “Oppenheimer” during the summer bolstered the success. Despite this, overall results still lagged behind pre-pandemic levels.

Online distribution

The online distribution of films and audiovisual content generated EUR 1.1 billion in consumer spending in 2023, making it by far the most popular method of consumption. The online market is dominated by SVOD, which saw a 16% growth in value in 2023. This is a positive result, but it also shows less growth than in previous years. This indicates that while the SVOD market is not yet saturated, the number of new subscribers increases less rapidly. The significant increase in value is also partly due to subscription price hikes and the introduction of additional costs for sharing subscriptions outside of households. Netflix remains the most popular SVOD service in the Netherlands, followed by Videoland and Disney+.

The online transactional market (Pay TV, TVOD) experienced a marginal growth of 2% in 2023, with total consumer spending reaching EUR 87 million. Despite this increase, TVOD remains a relatively small market compared to SVOD. However, long-term sales in the transactional market show a slow but steady growth. Pathé Thuis continues to be the most used service for TVOD in the Netherlands.

Physical market

Sales of films and audiovisual content on DVD and Blu-ray continued to decline in the Netherlands, experiencing a 19% decrease in 2023. While this decline is smaller than in previous years, it underscores the diminishing significance of the physical market, which now accounts for a total spending of EUR 14 million. The physical market no longer plays a significant role in the overall distribution channel.

A look at the future

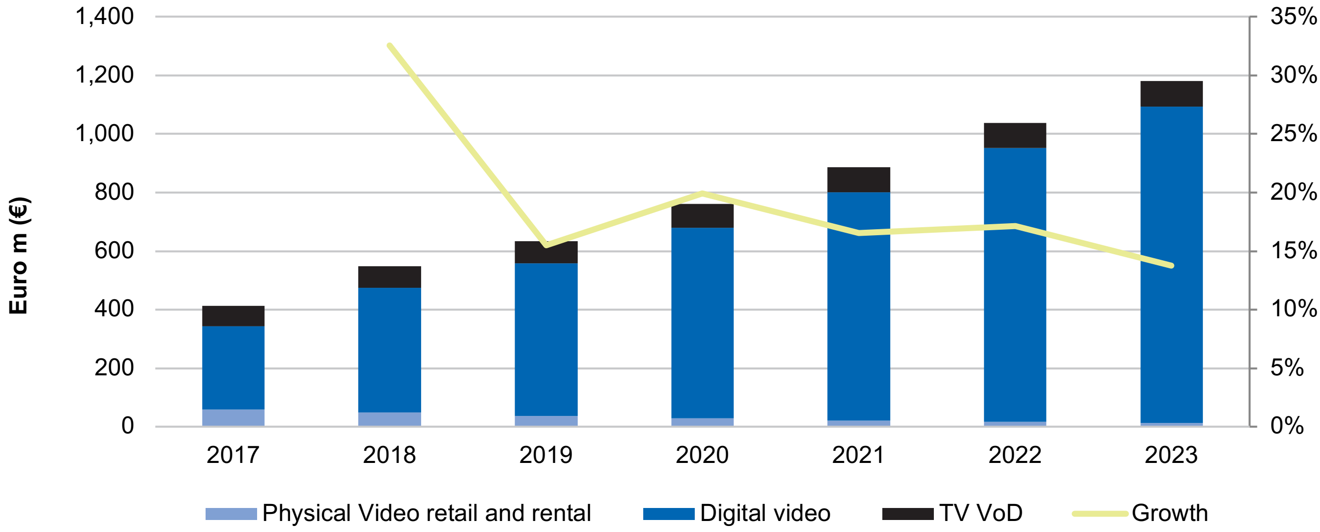
With the COVID-19 pandemic and the recent SAG-AFTRA strikes, the future appears a bit brighter for the Dutch film and audiovisual industry, though some challenges persist. There are still some uncertainties over the profitability of SVOD. Both existing and new SVOD services are gradually encountering difficulties in attracting new subscribers, as Dutch consumers seem hesitant to subscribe to more than an average of two services in total. As a result, services have been compelled to raise prices, potentially impacting subscriber numbers in the future. However, the online transactional market is poised to maintain a stable role as an alternative option alongside SVOD services. In contrast, the physical market no longer holds any importance in the Dutch home entertainment market.

This commentary was provided by NVPI film, the Dutch association for film distributors.

Video market: Netherlands

	2017	2018	2019	2020	2021	2022	2023	22/23
GENERAL								
Population (m)	17.0	17.1	17.1	17.1	17.2	17.2	17.2	0.2%
TV households (m)	7.7	7.8	7.8	7.9	7.9	7.9	8.0	0.5%
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)	6.2	6.5	6.6	6.7	6.8	6.9	7.0	1.3%
Nominal GDP (EUR m)	738.8	774.3	810.2	792.1	814.1	855.2	881.5	3.1%
Consumer price index (100 in 2010)	103.0	109.7	106.8	109.4	113.0	115.5	121.5	5.2%
DVD Video player/recorder penetration (%)	34.1	29.6	26.1	23.1	20.5	18.3	16.3	-10.5%
Blu-ray Disc player/recorders penetration (%)	19.4	19.1	18.5	17.9	17.4	16.6	16.1	-3.4%
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)	2.9	3.9	5.0	6.8	7.7	9.9	10.8	9.8%

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)	414.0	548.8	634.0	760.5	886.1	1,038.1	1,181.2	13.8%
Growth (%)		32.6%	15.5%	19.9%	16.5%	17.2%	13.8%	
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)	9.0	10.3	11.5	13.0	13.3	14.0	15.0	6.6%
Rental digital video (EUR m)	6.3	7.0	7.8	11.7	14.5	8.9	9.3	4.6%
Subscription digital video (EUR m)	268.4	408.5	501.6	626.9	752.3	913.2	1,056.2	15.7%
Total digital video (EUR m)	283.7	425.8	520.8	651.7	780.2	936.1	1,080.4	15.4%
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)	70.2	73.7	76.2	80.5	84.2	85.0	86.9	2.2%
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)	1.2	0.7	0.3	0.2	0.1	0.1	0.0	-36.8%
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)	58.9	48.6	36.7	28.2	21.7	16.9	13.8	-18.5%
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)	60.1	49.3	37.0	28.3	21.8	17.0	13.8	-18.6%
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.*

Key players in the market (in alphabetical order)

Physical	TVOD	SVOD
Bol.com	Apple TV	Disney+
MediaMarkt	Google Play	HBO Max
	Pathé Thuis	Netflix
	Prime Video	Prime Video
	YouTube	Videoland

Share of European market 2023

Digital video (OTT)
4.4%

Pay TV TVOD
8.4%

Physical retail
1.4%

Physical rental
0.2%

Average home entertainment spending

Spending per TV household (EURO)
€148.0

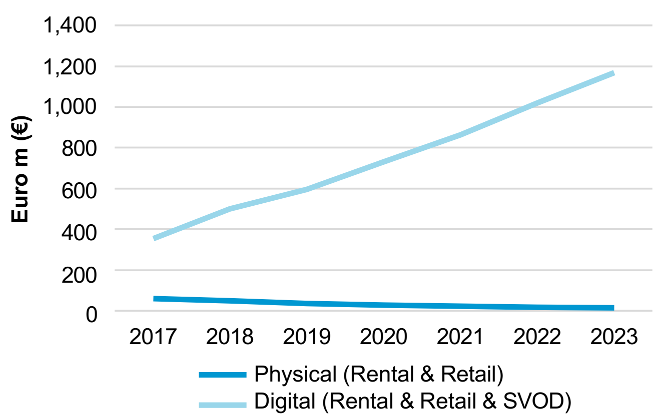
Spending per broadband household (EURO)
€169.7

Digital share of spend vs. broadband speed

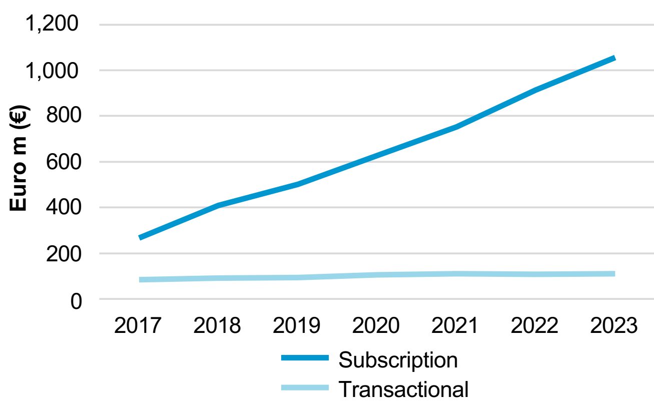
Share digital spend
91%

Broadband subscriptions speed rank
(ranked across the 9 IVF countries)*
#5

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