[DE] VAUNET market analysis reports continued growth of pay-TV and paid video content in Germany

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Katharina Kollmann
Institute of European Media Law

On 31 August 2023, VAUNET, the umbrella organisation of private audio and audiovisual media companies in Germany, published its annual report, “Pay-TV and Paid-VoD in Germany” for 2022/2023.

The report states that overall revenues for pay-TV and paid video-on-demand (VOD) in Germany rose by around 5% to EUR 4.9 billion in 2022. VAUNET predicts that they will grow by a further 8% to EUR 5.3 billion in 2023, breaking the EUR 5 billion barrier for the first time. In the German-speaking region (Germany, Austria and German-speaking Switzerland), revenue increased by approximately 4% to EUR 5.8 billion in 2022 and is expected to exceed EUR 6 billion for the first time in 2023 (EUR 6.3 billion).

VAUNET puts this growth down to the diversity of programming in Germany and strong demand for pay-TV and Subscription-Video-on-Demand (SVoD). The number of pay-TV subscriptions in Germany rose slightly from 9.6 million in 2021 to 10.1 million in 2022. In 2023, VAUNET anticipates that it will increase again to approximately 10.3 million. Meanwhile, the number of SVoD subscribers rose from 19.2 million in 2021 to 19.8 million in 2022, with VAUNET predicting a further increase to around 20.8 million in 2023.

Pay-TV channels achieved a monthly average reach of 17.7 million viewers in 2022, slightly fewer than in 2021 (17.9 million). In the first half of 2023, they reached an average of 17 million viewers per month (17.8 million in the first half of 2022).

Pay-TV’s average audience share among viewers aged 3 and over was 3.3% in 2022, compared with 3.2% the year before. It reached 3.5% in the first half of 2023 (3.2% in the first half of 2022).

VAUNET predicts further market growth over the next few years, although this will largely depend on the regulatory landscape. It believes that additional burdens such as government-induced investment obligations are weakening market dynamics, while incentive models could provide positive momentum.

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VAUNET-Publikation „Pay-TV und Paid-VoD in Deutschland“ für 2022/2023

https://vau.net/wp-content/uploads/2023/08/VAUNET-PUBLIKATION_Pay-TV-und-Paid-VOD-in-Deutschland-2023.pdf

VAUNET publication, "Pay-TV and Paid-VoD in Germany" for 2022/2023

VAUNET-Pressemitteilung vom 31. August 2023

https://vau.net/pressemeldungen/umsaetze-von-pay-tv-und-bezahlten-videoinhalten-in-deutschland-sind-2022-weitergewachsen/

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