

TV Streaming Report 2025

Germany

Dear Sir/Madam,

TV streaming usage continues to gain ground in Germany. Already 76 percent of Germans use streaming services, while nearly half (48%) can imagine receiving their TV content exclusively via the internet – or are already doing so. The three main advantages of TV streaming remain unchanged: time-shifted television (45%), availability on multiple devices (34%), and the easy discoverability of suitable content (28%).

This year's TV Streaming Report illustrates how TV usage in Germany is evolving. The focus is on television via the internet – also known as Over-the-Top (OTT) TV. The report is based on an online survey conducted by YouGov, in which 1,057 people in Germany participated between January 13 and 17, 2025. The results were weighted and are representative of the German population aged 16 to 69*. Zattoo has been conducting this study annually since 2015, thereby contributing to the discussion on the role of TV streaming in Germany. This year, the following developments can be observed:

Internet TV continues to grow, traditional reception methods lose importance

TV reception via the internet remains the preferred choice for many Germans in 2025. At 45 percent, the share remains stable compared to the previous year, while the use of traditional reception methods continues to decline. Cable is now used by only 28 percent of respondents, a decrease of two percentage points compared to 2024 – a relatively moderate figure, especially in light of the elimination of the ancillary cost privilege. Satellite TV reception also dropped by two percentage points and now stands at 30 percent.

It is important to note that multiple answers were possible, meaning many respondents use several reception methods in parallel. Particularly significant is that around a quarter of Germans already use TV streaming as their main method of TV reception. This development highlights that internet TV has established itself as a leading method of reception, while traditional channels continue to lose ground.

Live TV remains an important part of media consumption

YouTube remains the most used TV and video service on the internet. 61 percent of Germans use the platform to consume video content. This is followed by broadcasters' media libraries, which remain stable at 48 percent, the same as the previous year. The usage of live TV via the internet also remains unchanged at 31 percent. Meanwhile, video-on-demand services declined by four percentage points to 29 percent. In the long term, trust in the classic TV experience remains high: three out of four respondents (75%) believe they will still watch live TV in five years – more than half of them (55%) regularly or occasionally.

TV usage on smart TVs continues to increase, mobile usage declines
Streaming TV via smart TVs continues to grow. 65 percent now prefer the big screen for their TV experience – an increase of four percentage points compared to the previous year and a total rise of 16 percent over the last five years. This confirms the role of the smart TV as the central device for TV streaming. At the same time, mobile devices are losing relevance: 31 percent of respondents use a laptop or PC for TV streaming, while only 29 percent use a smartphone and 22 percent use a tablet. These trends from recent years underscore that streaming services have found a permanent place in the living room.

Economic situation continues to impact streaming behavior

The economic situation continues to affect streaming habits in Germany in 2025. 17 percent of respondents said they had canceled a streaming subscription in the past year due to financial reasons – the same figure as in 2024. However, more users are now opting for cheaper alternatives after canceling: while only 36 percent did so in the previous year, that figure has risen to 45 percent this year. Another 20 percent have even switched to free services. A new trend is also emerging in the form of conscious short-term use: one in four Germans (25%) stated they subscribed to a streaming service only for a short period – for instance, to watch a specific series, film, or sports event – and then canceled it again.

Still many inactive cable customers after the end of the cost apportionment for cable TV

One-third of tenants whose cable fees were covered by service charges until July 1, 2024, have still not made an active decision regarding a new method of TV reception. Their TV service continues to function as it did before the deadline, even though the cost apportionment for cable TV is no longer valid. This figure has not changed since the last survey in September 2024.

Best regards,

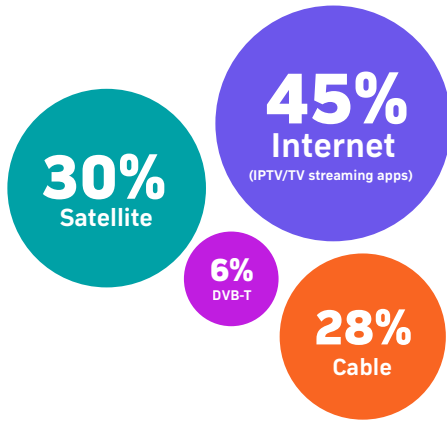


Jörg Meyer
Chief Commercial Officer at Zattoo

*About the survey

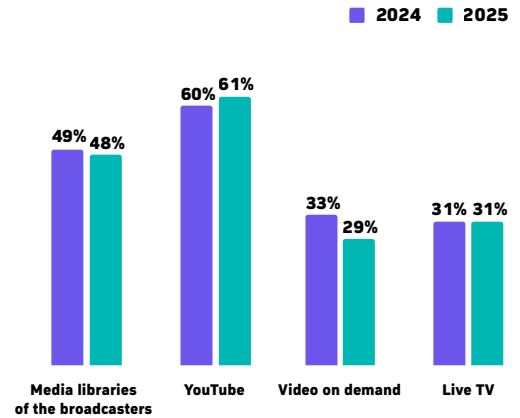
The data from this survey are based on online interviews with members of the YouGov panel who agreed to participate in advance. A total of 1,057 people aged 16 to 69 were questioned for this survey between 13th and 17th January 2025. The survey was apportioned based on age, gender and region, and the results were then weighted accordingly. The results are representative of the German population aged 16 to 69 years.

1 How do you receive TV in your household??



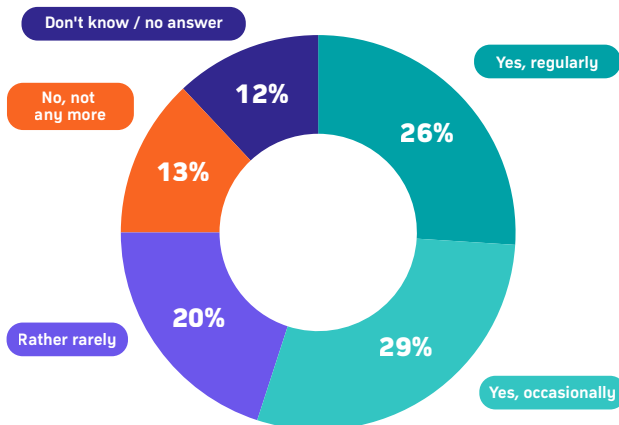
Basis ungew.: 1057
Multiple answers possible

2 Which television or video offerings do you use on the internet?



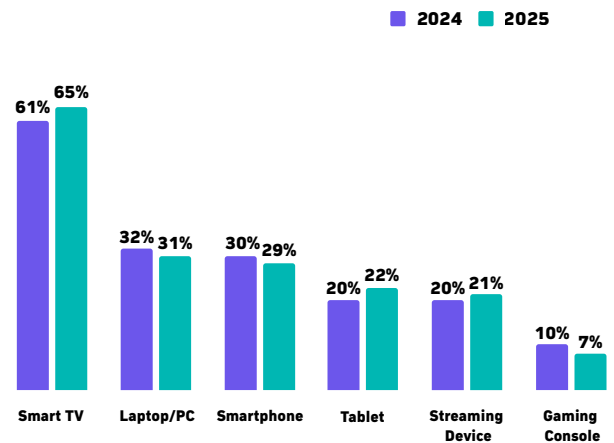
2025 Basis unweighted: 1057
2024 Basis unweighted: 1081
Multiple answers possible

3 Do you think you will still be watching linear television (live TV) in 5 years?



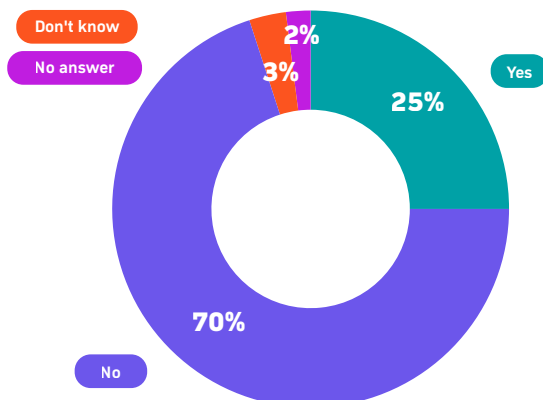
Basis: Respondents who watch linear television
Basis unweighted: 920

4 On which devices do you watch TV via the internet?



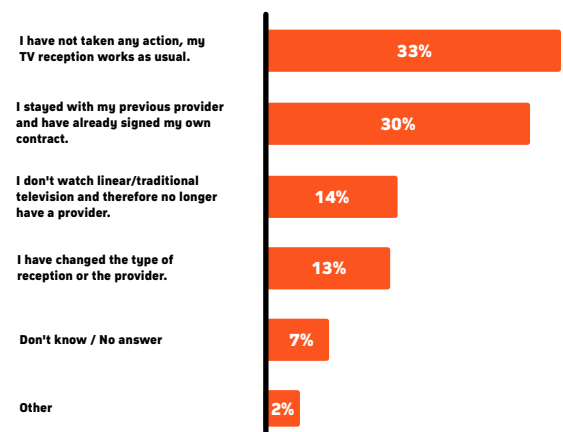
Basis: Respondents who watch TV via the Internet
2025 Basis unweighted: 699
2024 Basis unweighted: 788
Multiple answers possible

5 Did you intentionally subscribe to a streaming service for a short period in order to cancel it afterwards?



Basis unweighted: 1057

6 How have you arranged your TV reception since 01.07.2024?



Basis: Respondents who are tenants and whose cable fees were billed via the ancillary costs of the tenancy agreement
Basis unweighted: 234