

TV 2023: Germany between crisis and escapism

Tatort, football and shows dominate hit lists | Daily streaming usage on the rise | Interest in royals remains high

Frankfurt, 05.01.2024. At the end of 2023, the Society for the German Language named 'crisis mode' the "Word of the Year". This is understandable, as 2023 was also characterised by so-called 'perma-crises': Conflicts in Ukraine and the Middle East, the aftermath of the corona pandemic, the effects of climate change, the overall economic situation and the associated political challenges. It therefore comes as no surprise that media interest, particularly in traditional linear TV, once again focussed on information content. In addition to the interest in news, magazines and documentaries, television in 2023 also catered to the desire for distraction through strong entertainment shows and fictional formats.

"This confirms the trend of previous years: linear television still has a strong position when it comes to up-to-date information and formats with a pronounced live character, even though no major sporting events with successful German participation took place in 2023 and this, among all other effects, is also reflected in the data," says Kerstin Niederauer-Kopf, CEO of AGF Videoforschung.

In 2023, 61.5 per cent of viewers aged 3 and over, or 47.087 million, tuned in daily for a wide range of content from the programme providers, which is 2.6 percentage points less than in the previous year. Daily TV viewing in 2023 was 182 minutes for people aged 3 and over (2022: 195 minutes) and 87 minutes for 14 to 49-year-olds (2022: 101 minutes), both lower than in the previous year.

"In view of the oversupply of media, this is still a considerable proportion of usage. Ultimately, people do not have an infinite media time budget and this is now spread across several media genres and forms of content due to the ever-increasing intra- and intermedia fragmentation," explains Niederauer-Kopf.

The share of usage of information offerings such as news, magazines, reports and documentaries as well as talk shows was at 34 per cent and slightly lower in 2023 than in the previous year (2022: 36%), as the news and report genres each lost one percentage point. In contrast, the relative usage shares for entertainment programmes and fictional formats increased by around 2 percentage points compared to the previous year to a total of around 60 per cent. Sports broadcasts and programmes remain at the same level at around 6 per cent.

"The slight shifts in programme interest seem to indicate that viewers are still very interested in well-researched and strong information formats, but are also looking for distraction from everyday life in a time of permanent crises and conflicts," said the CEO.

The most successful TV-formats in 2023

A look at the most successful TV formats in 2023 paints a largely stable picture: 2023 was not a 'classic sports year', with no major sporting events and therefore no viewer magnets such as the Olympic Games or the FIFA Men's World Cup taking place in the summer months, which are weaker for seasonal reasons anyway. The most successful TV format was "Tatort: MagicMom" on Das Erste with an average of 13.928 million viewers aged 3 and over, which corresponds to a market share of 40.5 per cent. Thomas Gottschalk's farewell performance on "Wetten, dass...?" gave ZDF an impressive average audience of 12.892 million viewers (45.8% market share), putting it in second place, while the Münster Tatort "Der Mann, der in den Dschungel fiel" came in third with an audience of 11.613 million (37.7% market share). As expected, the TOP 5 included football matches – even the women's national team for several years now, whose early exit from the World Cup most likely caused the subsequent matches without German participation to lose some of their appeal. The women's national team's second group match against Colombia was watched by 10.374 million viewers, corresponding to a market share of 61.3 per cent. The men's international match between Germany and France followed just behind with an average audience of 10.369 million viewers and a market share of 42.2 per cent.

Top 5 TV-formats 2023: Viewers 3 and over

(Mon.–Sun., 3-3) | Average viewing | market share | minimum format length 10 minutes

1. „Tatort: MagicMom“ (Das Erste, 05/03/2023): 13.928m | 40.5%
2. „Wetten, dass...?“ (ZDF, 25/11/2023): 12.892m | 45.8%
3. „Tatort: Der Mann, der in den Dschungel fiel“ (Das Erste, 10/12/2023): 11.613m | 37.7%
4. „Women's World Cup: Germany – Colombia“ (Das Erste, 30/07/2023): 10.374m | 61.3%
5. „Men's Football match Germany – France“ (Das Erste, 12/09/2023): 10.369m | 42.2%

Source: AGF Videoforschung in cooperation with GfK; AGF SCOPE 1.4, 01/01/2023-31/12/2023, market standard: TV, 04/01/2024

Among viewers aged between 14 and 49, Thomas Gottschalk's last "Wetten, dass...?" show even took first place with an average audience of 3.665 million and a market share of 54.8 per cent - the highest since 2013. The "Eurovision Song Contest" came in second place with 3.282 million viewers and a market share of 52.9 per cent. The contest, which according to ESC rules would have taken place in the Ukrainian home of the winning band Kalush Orchestra, was moved to Liverpool due to the war. In third place was "Tatort: MagicMom" with a viewing audience of 3.066 million, corresponding to a market share of 33.9 per cent. In fourth place, also in the younger target group, is the international match between Germany and France with 3.013 million viewers and a market share of 49.5 per cent, followed in fifth place by the German women's World Cup match against Colombia: the viewing figures here were 2.334 million, with a market share of 57.8 per cent.

Top 5 TV-formats 2023: Viewers between 14 and 49

(Mon.–Sun., 3-3) | Average viewing | market share | minimum format length 10 minutes

1. „Wetten, dass...?“ (ZDF, 25/11/2023): 3.665m | 54,8%
2. „Eurovision Song Contest“ (Das Erste, 13/05/2023): 3.282m | 52,9%
3. „Tatort: MagicMom“ (Das Erste, 05/03/2023): 3.066m | 33,9%
4. „Fußball-Länderspiel Deutschland – Frankreich“ (Das Erste, 12/09/2023): 3.013m | 49,5%
5. „Fußball-WM Frauen: Deutschland – Kolumbien“ (Das Erste, 30/07/2023): 2,334m | 57,8%

Source: AGF Videoforschung in cooperation with GfK; AGF SCOPE 1.4, 01/01/2023-31/12/2023, market standard: TV, 04/01/2024

Streaming usage continues to rise

The fact that media usage habits are changing is also confirmed by the data for the streaming services measured by AGF: Last year, a total of 64.227 million people had contact with a publisher's streaming offering at least once, which corresponds to 81.4 per cent of the population. The average viewing time also increased by 20 per cent compared to the previous year and averages 5 minutes per day in 2023 (2022: 4 minutes), both among viewers aged 3 and over and among 14 to 49-year-olds.

The identification and integration of additional streaming services and platforms such as DAZN, which have been under AGF measurement since December 2023, will also be reflected in an overall increase in streaming usage figures in the future. Kerstin Niederauer-Kopf explains why: "We are already seeing that – due to the digital origin of the platform – DAZN's Bundesliga broadcasts, for example, reach significantly more people in video streaming than via the classic linear broadcasting channel, thereby increasing the streaming share in the AGF system."

Such changes in usage habits and new forms of offering made it necessary to switch to the existing video market standard across the board on 1 January 2024. This also affects traditional TV analyses. With this changeover, the final TV data plus the 24/7 live stream with the same content will be reported in full 8 days after the linear broadcast. A comparison of the analysis of formats in both standards shows a trend:

"People like to follow major sporting events or shows live, not least to keep up to date. New distribution methods and channels make it possible to experience the content 'live' at almost any time via a mobile device. Even if the big screen is still the most relevant screen, the additional use of the 24/7 live stream, especially for sporting events, shows that this usage is on the rise due to its relevance to current events - making it all the more important that AGF takes this into account in its standards," explains Niederauer-Kopf.

For example, the live broadcast of the match between Germany and Colombia at the Women's World Cup on 30 July 2023 achieved an average total audience share of 10.549 million viewers. Of this, 10.374 million watched traditional linear TV and 0.174 million used the 24/7 live stream with the same content, which was made available via ARD's media libraries.

"In the case of fictional formats – especially long-form – time-sensitive usage is an important key asset, which is also reflected in the increasing VoD usage," says Kerstin Niederauer-Kopf.

New era in Great Britain: King Charles' coronation

On 6 May 2023, Charles, eldest son of Queen Elizabeth II, who died in 2022, and heir to the throne, was crowned as the 40th monarch in London's Westminster Abbey. After the Queen's death triggered a huge wave of emotion last year, with more than 50 million people watching on linear TV, livestream and 'on demand', Charles was a worthy successor in May 2023: The live broadcasts and additional programmes aired on Coronation Day reached 30.930 million viewers at least once across all channels under measurement.

60 years of „Dinner for One“: British sketch becomes a German New Year’s Eve tradition

In 1963, "Dinner for One" was shown on German television for the first time after presenter Peter Frankenfeld discovered comedian Freddie Frinton in a variety theatre in Blackpool, England. Although Frinton had performed the sketch in various cities in the UK since the 1940s, it is virtually unknown in his home country. It was first shown on British television in 2018 on Sky Arts. Since 1972, "Dinner for One" has only been broadcast on ARD channels on New Year's Eve and has been as much a part of the last evening of the year for many as fireworks and lead pouring. In the anniversary year 2023, 14.213 million people tuned into a broadcast of "Dinner for One" at least once for a minute on New Year's Eve. According to FOCUS research, the sketch is based on the true story of the dowager duchess Sophie Karoline Amalie von Sachsen-Gotha-Altenburg, who, according to her cousin, celebrated dinner parties with her deceased friends. Sketch writer Laurie Wylie discovered records of the anecdote and wrote "Dinner for One" as a result.

About AGF Videoforschung GmbH (www.agf.de)

AGF Videoforschung GmbH specializes in impartial video research. AGF continuously tracks the use of video content in Germany on a quantitative basis and analyses the data collected. It invests many millions of euros per year to continuously refine its instruments in order to deliver reliable data on the use of video content to the market on a daily basis. AGF consults closely with all market partners, including licensed TV stations, advertisers and media agencies.



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