

TV 2024: live sport, Tatort and a comeback

- **Live sporting events and Tatort top the TV hit lists**
- **Unbroken interest in political developments and social debates**
- **Streaming usage on the rise**

Frankfurt, January 8, 2025 – The year 2024 set a new benchmark for evaluating linear TV usage in Germany. With the introduction of the **"video market standard"** on January 1, 2024, for the first time, usage data from traditional television and 24/7 live streams on streaming platforms, equivalent to linear broadcasts, were combined into a unified standard. This new TV standard reflects the changing viewing habits of audiences and enables a more comprehensive analysis of TV consumption, including data from streaming platforms measured by AGF.

Unlike the TV market standard, which was in effect until the end of 2023, the video market standard is based on an expanded total population, also incorporating households without a TV set but with devices enabling video usage.

Due to differences in total population definitions and performance allocations, direct year-on-year comparisons between the two standards are not meaningful and require an adjustment. Under the leading video market standard, 58.9 percent of viewers aged 3 and older—or 46.063 million people—tuned in daily to various program formats in 2024. Among individuals in TV households (TV market standard) this figure was 61.3 percent, showing only a slight decrease of 0.2 percentage points compared to 2023 (61.5%) when using the same total population definition.

Daily TV consumption in 2024 averaged 171 minutes for viewers aged 3 and older under the video market standard, and 176 minutes under the TV market standard. This marks a decline of 6 minutes compared to the previous year (182 minutes) on a like-for-like basis. Among 14- to 49-year-olds, the video market standard recorded an average viewing time of 79 minutes, while the TV market standard showed 83 minutes (2023: 87 minutes). Although these values are lower than in the previous year, the choice of total population highlights a significant methodological effect that cannot be equated with a market effect.

"The video market continued its dynamic development in 2024, introducing numerous new offerings. Despite the overwhelming media landscape and advancing fragmentation, classic linear TV still achieves significant usage shares and reach. The year 2024 was a spectacular sports year, further shaped by political changes and economic challenges both domestically and internationally. The relevance of these events is clearly reflected in audience interest," explained Niederauer-Kopf, CEO of AGF Videoforschung.

The Sports Year 2024 offered an impressive series of highlights: From the Darts World Championship and the Men's Handball European Championship in January, to Super Bowl LVIII in February, the Ice Hockey World Championship in May, and the Athletics European Championships in June, followed by the UEFA European Football Championship for men and the Tour de France in June/July, the Olympic Summer Games, the Paralympics, and finally the Women's Handball European Championship. These international sporting events also achieved remarkable reach and market shares in Germany. The share of informational content, such as news, magazines, reports, documentaries, and talk shows, accounted for approximately 34 percent of TV usage in 2024, while entertainment programming, factual entertainment, and fictional formats made up around 57 percent.

UEFA EURO 2024 and Olympic Summer Games:

As expected, the UEFA European Football Championship for men in Germany was a major ratings driver. The matches featuring the German team were the most-watched broadcasts of the year – the game between Spain and Germany on July 5 averaged 27.154 million viewers aged 3 and older, corresponding to a market share of 80.9 percent. Among the 14- to 49-year-old demographic, this match achieved an average of 9.543 million viewers, or a market share of 89.7 percent.

Both public broadcasters and RTL provided extensive live coverage, additional reporting on free TV, and supplementary content on their streaming platforms, captivating millions of viewers. MagentaTV also secured the rights to broadcast all 51 UEFA EURO 2024 matches and provided its subscribers with comprehensive coverage alongside the free TV channels. The coverage of UEFA EURO 2024 on free TV, including live broadcasts and additional programming, reached 67.784 million viewers for at least one consecutive minute. Focusing solely on live broadcasts from free TV channels, without additional reporting, 66.222 million viewers were reached at least once. Including live broadcasts across all channels, including the three MagentaTV channels (FUSSBALL.TV 1, FUSSBALL.TV 2, FUSSBALL.TV 3), a total of 67.265 million viewers were reached at least once. This indicates that over one million viewers were reached exclusively via MagentaTV.

The Olympic Summer Games in Paris also captivated audiences: both on-site and in front of their screens. The live broadcasts and additional programming reached 54.827 million viewers for at least one consecutive minute through ARD, ZDF, and Eurosport. In total, competitions were held in 32 sports and 48 disciplines, with 329 events.

High interest in political developments at home and abroad: State elections, international crises, and global engagement

The ongoing "crisis mode" also shaped audience behavior during the 2024 video year. Ongoing conflicts in Ukraine and the Middle East, advancing climate change, as well as political challenges and changes both domestically and abroad—compounded by a difficult economic situation—resulted in high usage of relevant informational formats provided by broadcasters.

Interest in information has remained consistently high in Germany since the COVID-19 pandemic in 2020 and is driven by the competency of traditional, up-to-date media—primarily TV. Nationally, discussions surrounding the grand coalition, state elections in Brandenburg, Saxony, and Thuringia, and the breakdown of the federal traffic light coalition in November 2024 garnered significant attention and widespread media coverage.

The strong interest in information among Germans is also reflected in media consumption: Approximately 79 percent of TV viewers reported having at least an "average interest" in political topics – a figure that, while slightly lower than in previous years (2023: 81.2%), still remains very high. This decline is attributed to specific subgroups expressing a particularly strong interest in political topics (2024: 39.0% vs. 2023: 41.1%). Conversely, there was a 2.4 percentage point increase in those with little to no interest in political topics (2024: 19.3% vs. 2023: 16.9%).

The proportion of viewers who "enjoy" watching political programming increased slightly compared to 2023, reaching 43.0 percent in 2024 (2023: 42.2%). Political reporting on TV and streaming platforms remains an indispensable source of information, especially during elections, societal tensions, and global crises.

Global crises and conflicts attracted wide audiences:

Beyond national elections, global crises and conflicts drew significant audiences. The special broadcast "Brennpunkt: Umsturz in Syrien" ("Breaking Point: Coup in Syria") on December 8, 2024, at 8:15 PM on Das Erste achieved the highest viewership of all informational specials this year, with an average of 8.278 million viewers. Other specials on Das Erste, such as "Brennpunkt: Großangriff auf Israel" ("Breaking Point: Major Attack on Israel") on April 14, 2024 (7.541 million), and "Brennpunkt: Attentat auf Trump" ("Breaking Point: Assassination Attempt on Trump") on July 14, 2024 (7.508 million), also garnered significant interest.

While state elections and crisis reporting dominated the political agenda in Germany, the 2024 US Presidential Elections attracted global attention. Joe Biden's withdrawal, Kamala Harris's candidacy as the first Afro-Indian-American presidential candidate, and Donald Trump's return to the White House led to intensive coverage.

Interest in the US elections was also high in Germany. On November 5, traditional German news broadcasters such as Das Erste, regional channels (Dritte), ZDF, n-tv, Phoenix, ProSieben, RTL, SAT.1, Welt, and 3SAT collectively reached 15.707 million viewers with coverage of the US election. On November 6, this number rose to an impressive 29.749 million people who engaged with at least one election-related program.

International channels such as CNBC Europe, CNN International, and BBC World News also received significant attention. On November 5 and 6, these channels reached 1.030 million and 1.054 million viewers, respectively, for at least one consecutive minute. Compared to the 2024 annual average, these two days saw nearly three times as many viewers tuning into these international networks in Germany.

"Given the relevance of these topics in daily TV consumption, it becomes evident once again that timely and neutral reporting and information competency in the media play a central role in a democratic society during these turbulent times," said Niederauer-Kopf.

Streaming Usage Continues to Rise

The year 2024 confirmed the overall upward trend in streaming offerings measured by AGF. While linear television, despite slightly declining usage, continues to play a strong role in the media landscape, the growing importance of streaming services is evident in the changing viewing habits of audiences. Particularly in demand was content with a strong live component and high topical relevance, such as live sports broadcasts, but also entertainment shows.

In the past year, a total of 68.193 million viewers had contact with a streaming service measured by active AGF monitoring at least once. This corresponds to a share of 86.4 percent

and represents a 6.0 percent increase compared to the previous year. The average daily viewing time also rose by 36.3 percent compared to the previous year, reaching 7 minutes per day in 2024 (2023: 5 minutes). Among the 14- to 49-year-old demographic, the average viewing time increased from 5 to 8 minutes, which corresponds to a rise of 51.5 percent.

Additionally, results from the passive AGF Smart Meter measurement show that the streaming platforms Amazon, Disney+, Netflix, and YouTube, with an average daily viewing time of 13 minutes on the big screen, have become a firmly established part of video consumption in Germany.

The Most Successful TV Formats of 2024

The year 2024 was a classic sports year, with the UEFA EURO 2024 for men held in Germany being the main audience magnet. It is therefore unsurprising that the highest-reaching broadcasts of the year were from this major sports event.

Looking at viewer favorites outside of sports events, a largely stable picture emerges. The Tatort series on Das Erste has dominated as the most successful TV format for the general audience for years, and this was again the case in 2024. Leading the list is the episode "Tatort: Unter Gärtnern" ("Tatort: Among Gardeners") on March 17, 2024, with an average of 13.318 million viewers aged 3 and older (41.3% market share).

Top 5 TV Formats 2024 (All): Total Viewers

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

1. "UEFA EURO 2024 Men: Spain – Germany" (Das Erste, 05.07.2024):
27.154 million | 80.9%
2. "UEFA EURO 2024 Men: Switzerland – Germany" (Das Erste, 23.06.2024):
26.453 million | 73.3%
3. "UEFA EURO 2024 Men: Germany – Hungary" (Das Erste, 19.06.2024):
24.837 million | 77.1%
4. "sportstudio live – UEFA EURO 2024: Germany – Denmark" (ZDF, 29.06.2024):
24.396 million | 76.4%
5. "sportstudio live – UEFA EURO 2024: Germany – Scotland" (ZDF, 14.06.2024):
24.182 million | 72.1%

Source: AGF Videoforschung; AGF SCOPE 1.9; 01.01.2024–31.12.2024; Market Standard: Video; Analysis Type: TV; Convention; Package Number: 14798 02.01.2025

Among 14- to 49-year-olds, unlike the general audience, the UEFA EURO 2024 match between Germany and the Swiss national team tops the list. On average, 10.422 million viewers followed the game (84.4% market share), followed by other matches. For non-sports programming, entertainment events and **Tagesschau** broadcasts during live sports environments dominated.

Top 5 TV Formats 2024 (All): Viewers between 14-49

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

1. "UEFA EURO 2024 Men: Switzerland – Germany" (Das Erste, 23.06.2024):
10.422 million | 84.4%
2. "UEFA EURO 2024 Men: Spain – Germany" (Das Erste, 05.07.2024):
9.543 million | 89.7%
3. "sportstudio live – UEFA EURO 2024: Germany – Scotland" (ZDF, 14.06.2024):
9.125 million | 85.9%
4. "UEFA EURO 2024 Men: Germany – Hungary" (Das Erste, 19.06.2024):
8.893 million | 86.7%
5. "sportstudio live – UEFA EURO 2024: Germany – Denmark" (ZDF, 29.06.2024):
8.832 million | 85.7%

Source: AGF Videoforschung; AGF SCOPE 1.9; 01.01.2024–31.12.2024; Market Standard: video; Analysis Type: TV; Convention; Package Number: 14798 02.01.2025

Top 5 TV Formats 2024 (Excluding Sports): Viewers between 14–49

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

1. "Tagesschau" (Das Erste, 19.06.2024):
4.160 million | 57.8%
2. "DER CLARK FINAL FIGHT – STEFAN RAAB VS. REGINA HALMICH Episode 1"
(RTL, 14.09.2024):
3.026 million | 51.7%
3. "Eurovision Song Contest 2024" (Das Erste, 11.05.2024):
2.955 million | 51.4%
4. "Tagesschau" (Das Erste, 15.06.2024):
2.525 million | 52.3%
5. "I'M A CELEBRITY – GET ME OUT OF HERE Episode 1" (RTL, 19.01.2024):
2.479 million | 40.7%

Source: AGF Videoforschung; AGF SCOPE 1.9; 01.01.2024–31.12.2024; Market Standard: video; Analysis Type: TV; Convention; Package Number: 14798 02.01.2025

Strong Entertainment Shows Captivate Millions

Stefan Raab, who had withdrawn from television in 2015, made a remarkable comeback in 2024—this time on RTL. On September 14, 2024, RTL aired "Der Clark Final Fight", featuring another legendary TV match between Stefan Raab and Regina Halmich. With 6.053 million viewers, this mix of sports and entertainment became one of the most successful entertainment formats of the year among the general audience, following the Eurovision Song Contest (7.573 million) and Carolin Kebekus' #KINDERstören (6.072 million).

Among the younger target audience of 14- to 49-year-olds, the Re-Revenge claimed the top spot with 3.026 million viewers (51.7% market share).

Top 5 TV-formats 2024: Viewers between 14 and 49

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

1. „DER CLARK FINAL FIGHT - STEFAN RAAB VS. REGINA HALMICH Folge 1“ (RTL, 14.09.2024): 3,026 Mio. | 51,7%
2. „Eurovision Song Contest 2024“ (Das Erste, 11.05.2024): 2,955 Mio. | 51,4%
3. „ICH BIN EIN STAR – HOLT MICH HIER RAUS Folge 1“ (RTL, 19.01.2024): 2,479 Mio. | 40,7%
4. „ICH BIN EIN STAR – HOLT MICH HIER RAUS Folge 3“ (RTL, 21.01.2024): 2,204 Mio. | 27,9%
5. „ICH BIN EIN STAR – HOLT MICH HIER RAUS Folge 8“ (RTL, 26.01.2024): 2,114 Mio. | 36,2%

Source: AGF Videoforschung; AGF SCOPE 1.9; 01.01.2024-31.12.2024; market standard: video; Analysis type TV; convention; package number: 14798 02.01.2025

"The year 2024 demonstrated just how dynamically video consumption in Germany is evolving. However, despite all these changes, established usage patterns in traditional linear TV have once again been reaffirmed and solidified. Competence in delivering information through live sports events and up-to-date political reporting, along with strong entertainment formats and well-established fictional program brands that have been staples for many years or even decades, continue to hold their ground. The stability of these formats underscores that linear TV remains an anchor for a multimillion audience and that the content, rather than the distribution channel, is what captures viewers' attention." – **Kerstin Niederauer-Kopf, CEO.**

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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