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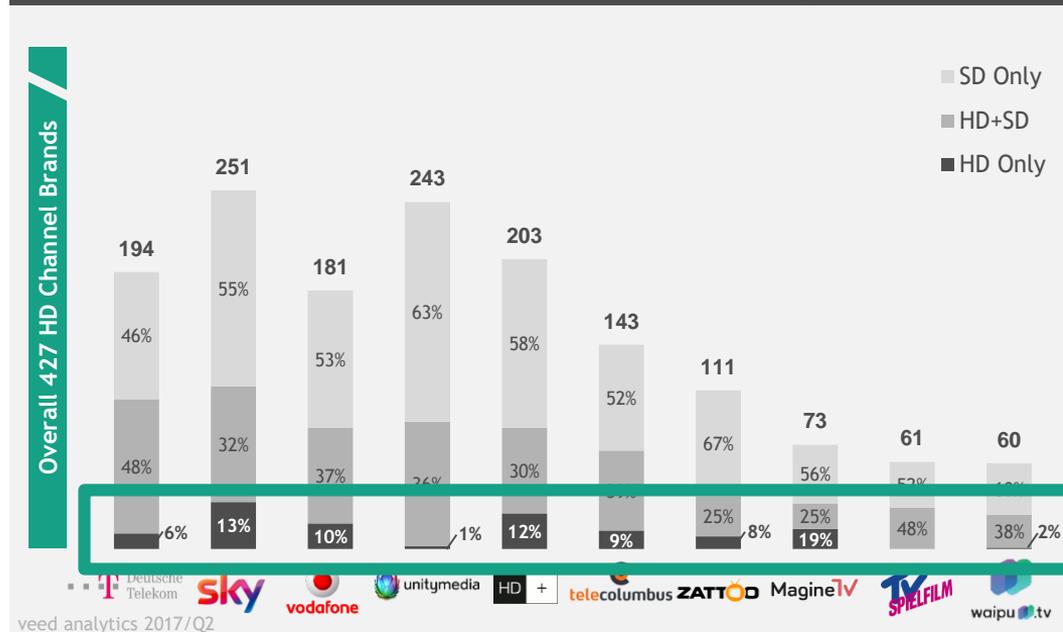
Linear TV Market Insights Germany

veed snapshot

September 2017

# “HD only” channel distribution is merely a side issue in the German TV market

## Linear Channel Qualities in Germany



## Key Insights

- „HD only“ channel distribution in Germany is still a side issue; driven by the missing intention from commercial FTA channels to skip their HD upsell model and a reach interpretation of the public service broadcasters (PSB) that so far still includes SD.
- Nevertheless, we expect a shift towards “HD only” distribution driven by PSB (as with the recent ARD announcement) and driven by Pay-TV channels.
- A shift clearly helps to reduce distribution cost both for TV networks and operators, consumers could benefit from limited confusion e.g. through “doublets” in the EPG or unclear number of channels they are paying for.
- Commercial FTA channels will be cautious in order to avoid harming their lucrative HD upsell model through “HD only” approaches.

# Disney and Discovery channels outperform competition in channel price for customers

Avg. Monthly HD Price per Pay-TV Channel

Key Insights

-15%



SONY

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... providers will likely start their own DTC service. This might eliminate the operators on the way towards the customer, but the responsibility for technical distribution, marketing to gain necessary reach and customer service will be solely on the content provider side



# veed analytics: your video market intelligence service

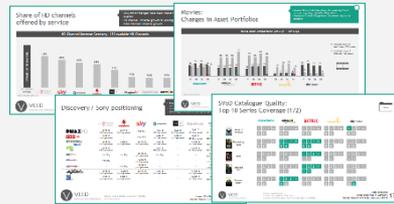
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- 100+ services and platforms from around the globe
- Try and compare user experiences at your ease and collect relevant insights from our market experts
- Benefit from veed analytics' expertise: packaging and pricing, strategic positioning, content approaches, underlying technologies



## Market Reports

- Understand the underlying market dynamics
- Covered markets: VoD (DE, US, UK) & Linear (DE, AT, CH)
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- Update cycle: quarterly



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- Integration of our latest analytic insights into modules

## Advisory & Bespoke

- Leverage our expertise and data access to answer strategic questions and receive guidance for your market activities
- Make use of our data analytics capabilities, international market knowledge and trend insights
- Enable yourself to make data and insight driven business decisions
- Leverage the treasure of the data you already have internally (partner reporting, usage data, and others) by benchmarking them with our data pool

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