

VEED

video services intelligence



The evolution of
catch-up content

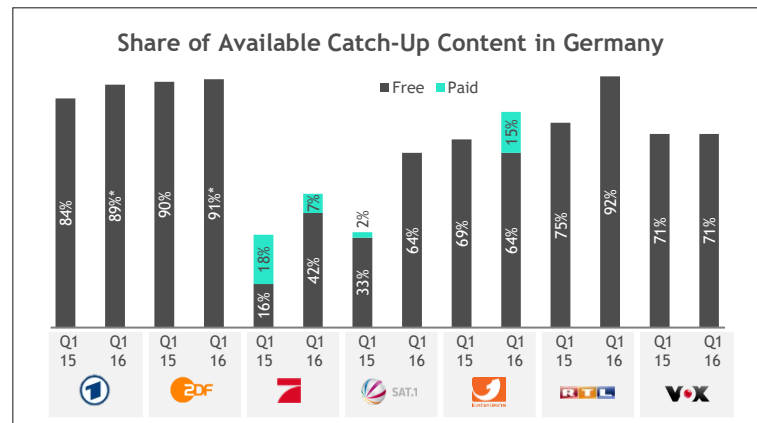
veed snapshot

August 2016

Overview: The overall catch-up availability in Germany is improving, but still lacking a full available backwards EPG

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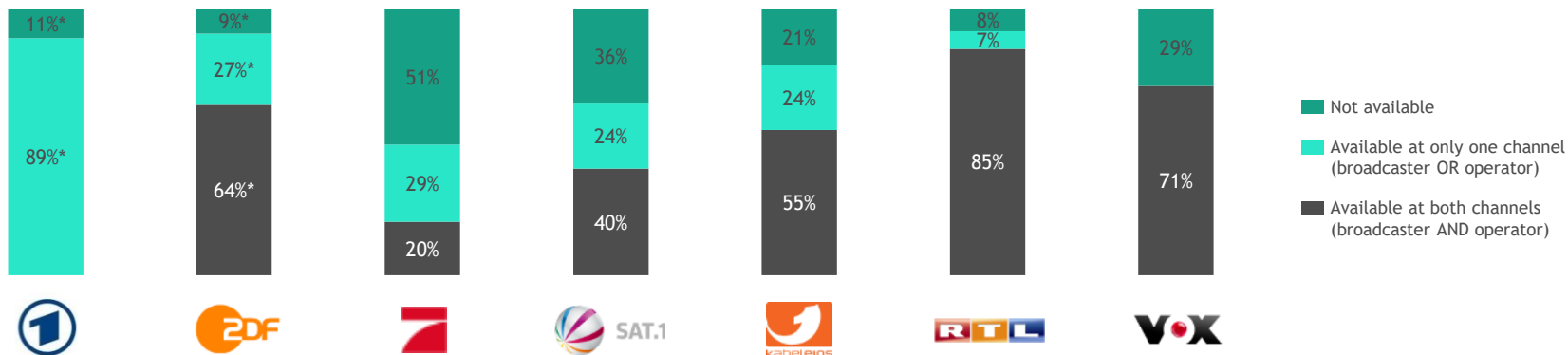
- Leading German broadcasters constantly improve their catch-up offerings, however, licensing rules hinder broadcasters and operators to offer the full EPG content as catch-up
- A single source to access broadcasted content on-demand is still missing, however, first providers like Deutsche Telekom offer workarounds to make more content accessible
- Observable shift of content from broadcasters' websites to separate cross-channel OTT hubs with premium features like Pre-TV or mobile app usage
- Catch-up business models of DACH operators and broadcasters still differ



Current Market Highlights

- P7S1 Group (DE): 7TV with free catch-up and paid live TV on mobile; externalized premium catch-up (maxdome)
- RTL Group (DE): Launch of TV Now with paid live TV on mobile/desktop, paid Pre-TV, and paid premium catch-up beyond free windows
- Deutsche Telekom (DE): Launch of Entertain Premium with fragmented backwards EPG including cross channel links to different sources
- A1 (AT): Launch of user-triggered full 7 day catch-up offering on mobile and desktop under legal conditions equal to Germany

Availability and fragmentation: The share of available catch-up content in Germany is high, but spread across broadcaster and operator channels



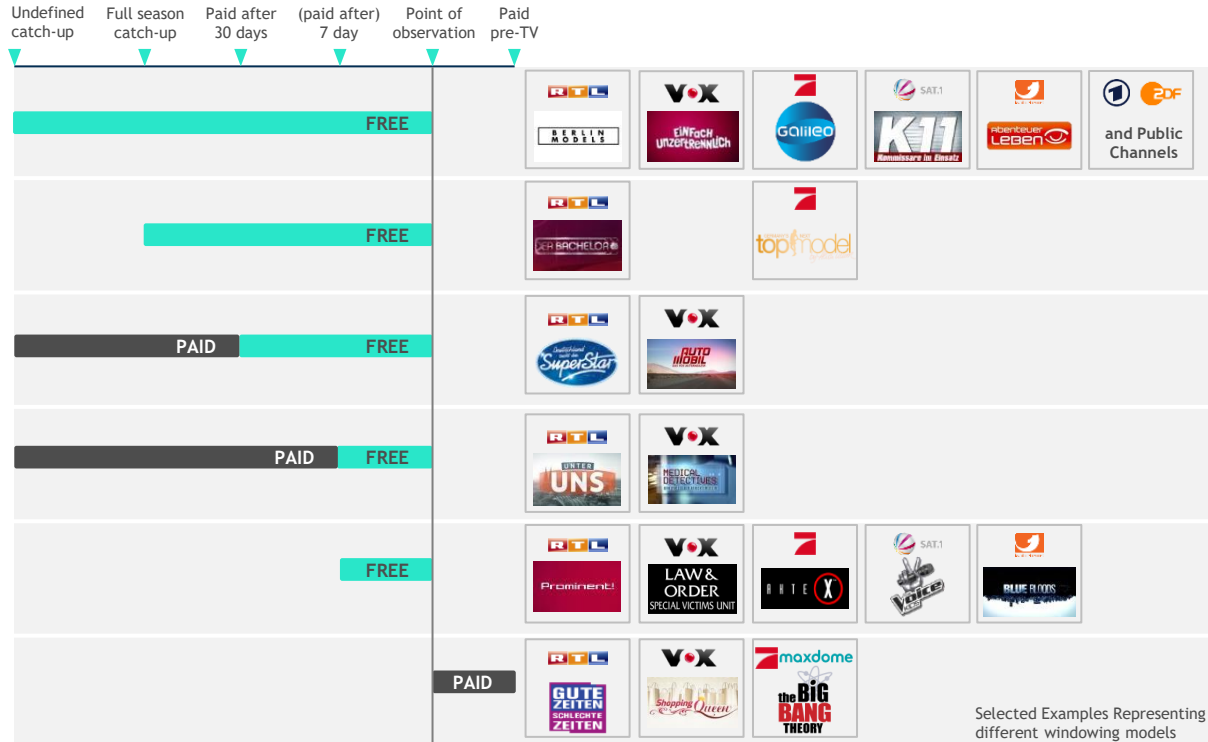
Overall Catch-Up Availability

- ! All channels show a catch-up availability larger than 50%; channels with a high share of own productions tend to lead the ranking
- ! RTL shows the highest catch-up coverage. Public broadcasters ZDF and ARD offer the second and third largest catch-up portfolios
- ! Only Kabel Eins (15%) and Pro7 (7%) offer paid catch-up content by integrating links to external sources into their EPGs

Channel Fragmentation of Catch-Up Content

- ! RTL offers the most consistent distribution of catch-up content with the lowest share of fragmentation across (broadcaster and operator) channels
- ! ARD content was not available on operator platforms during the period of observation, but is integrated today in Telekom's EntertainTV Plus
- ! Only VOX does not show disparities regarding available catch-up content across broadcaster and operator (VF Kabel Deutschland) channels

Broadcaster strategy: Broadcasters in Germany show very mixed business strategies within their “Mediatheken”



Key Insights

- Public channels offer the largest amount of content available for longer undefined periods of time
- Most content on private channels is only available during a limited time frame
- RTL group is the only one to monetize catch-up content after a defined period of free availability (“paid after xx days”)
- P7S1 monetizes longer catch-up windows externally via maxdome, but does not follow a strict “paid after xx days” model
- A large amount of content on private channels is limited to 7 day catch-up availability
- Movies are the least represented category on private channels’ catch-up offerings

Summary and Outlook

- The volume of catch-up content is steadily increasing across broadcaster and operator channels
- In addition to paid catch-up, broadcaster-offered “paid Pre-TV” arises as a new business model contrasting the use of VOD platforms such as maxdome for Pre-TV offerings
- Although there may be stages in-between, the presented catch-up windowing approaches dominate the German TV landscape
- The different strategic windowing approaches appear across broadcasters and genres. The only exception is “paid after xx days” which currently is only available at RTL Group
- Broadcasters’ catch-up offerings are most extensive when the share of own productions is high, in contrast to expensive licensed content
- The rights situation in Germany makes it difficult for broadcasters to offer U.S. content as catch-up or involves high license fees that are hard to pass on to customers

If you would like to evaluate the impact of catch-up content and related content rights issues on your business, please get in touch with:

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