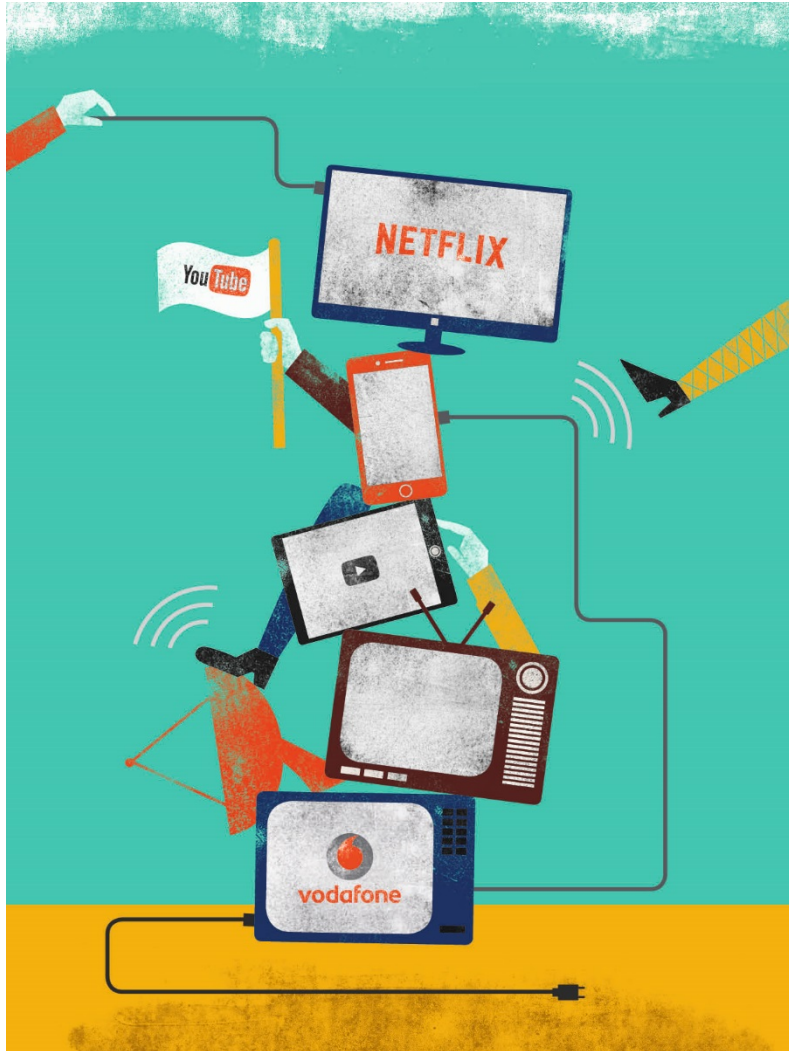




# Focus on potential and usage of platforms

Thomas Fuchs, Conference of Directors of the Media Authorities (DLM)

EPRA Meeting Yerevan, October 2016

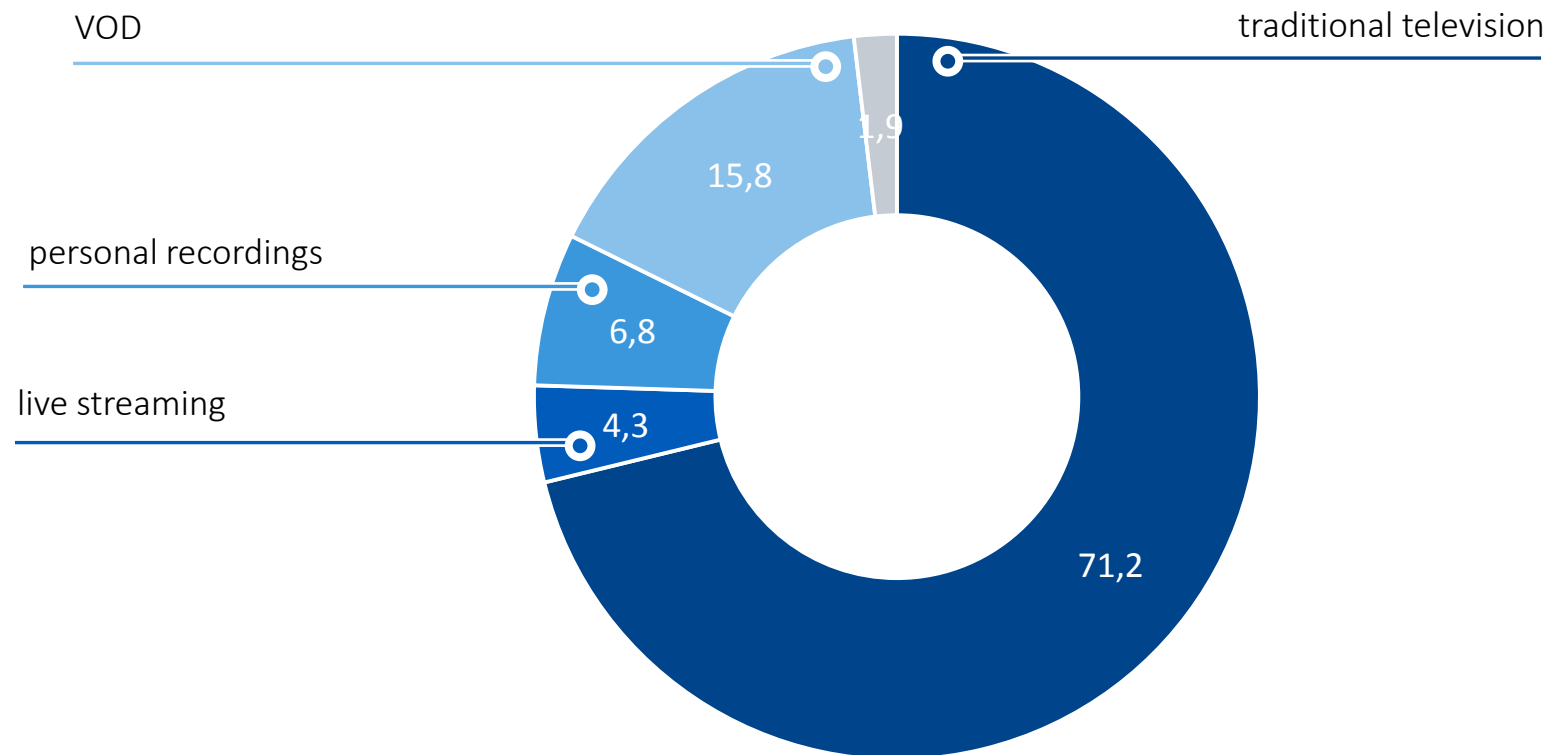


# 1

## Potential of audiovisual (online) platforms

## Television and online video – average shares of consumption

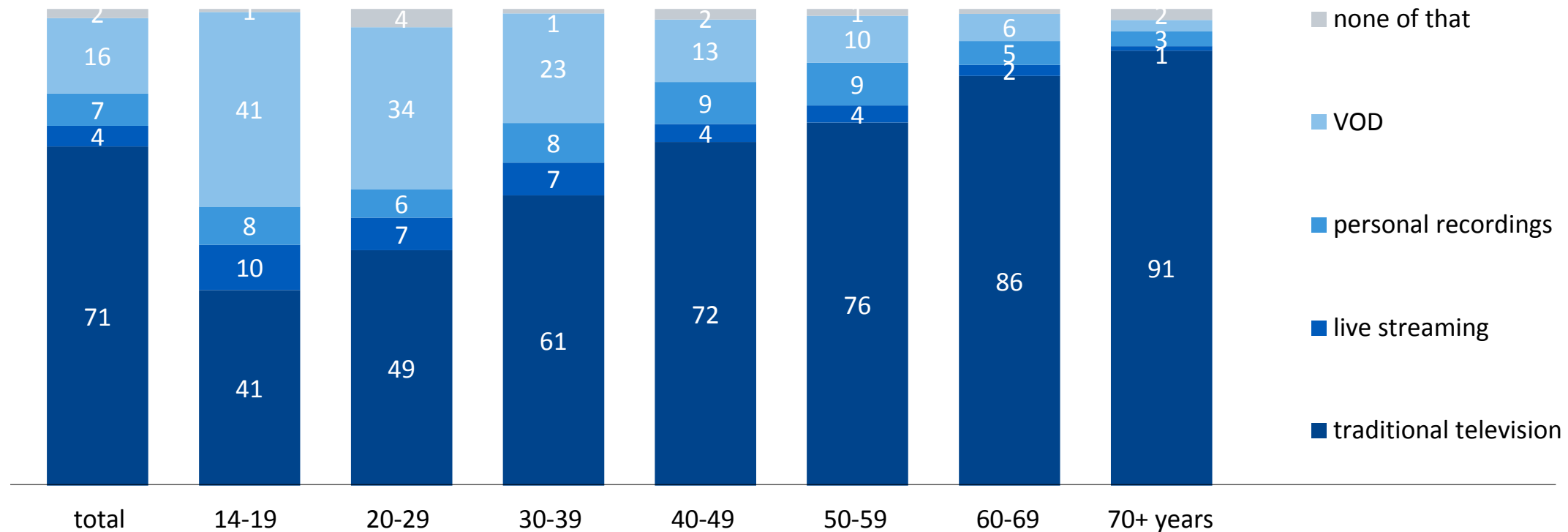
Traditional TV dominates consumption. VOD accounts for 16 per cent.



Source: Digitisation 2016 / TNS Infratest  
in per cent, basis: 69.241 million persons aged 14 years or older in Germany

## Television and online video – consumption by age

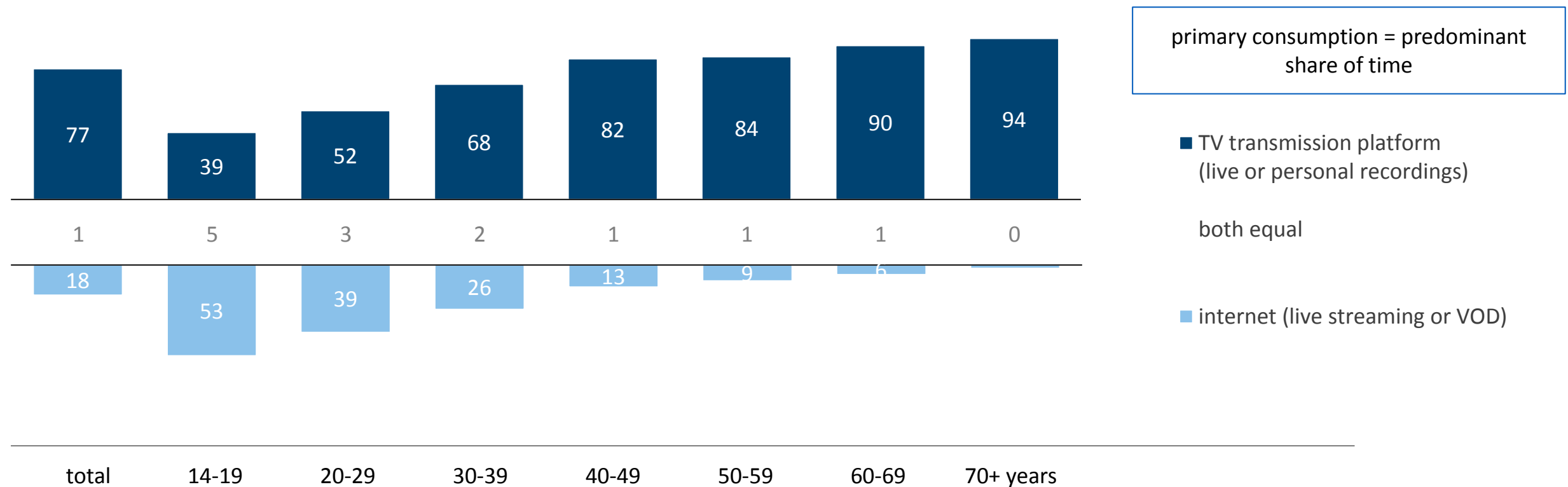
VOD already matches consumption via traditional TV in the younger age group.



Quelle: Digitisation 2016 / TNS Infratest  
in per cent; „don't know“ adjusted (between 0.8 and 3.2 per cent depending on age group)  
Basis: 69.241 million persons aged 14 years or older in Germany

## Primary source: television vs. internet

One in five spends more time consuming video content from the internet. This applies to any other in the younger age group.



Source: Digitisation 2016 / TNS Infratest  
in per cent; basis: 69.241 million persons aged 14 or older in Germany



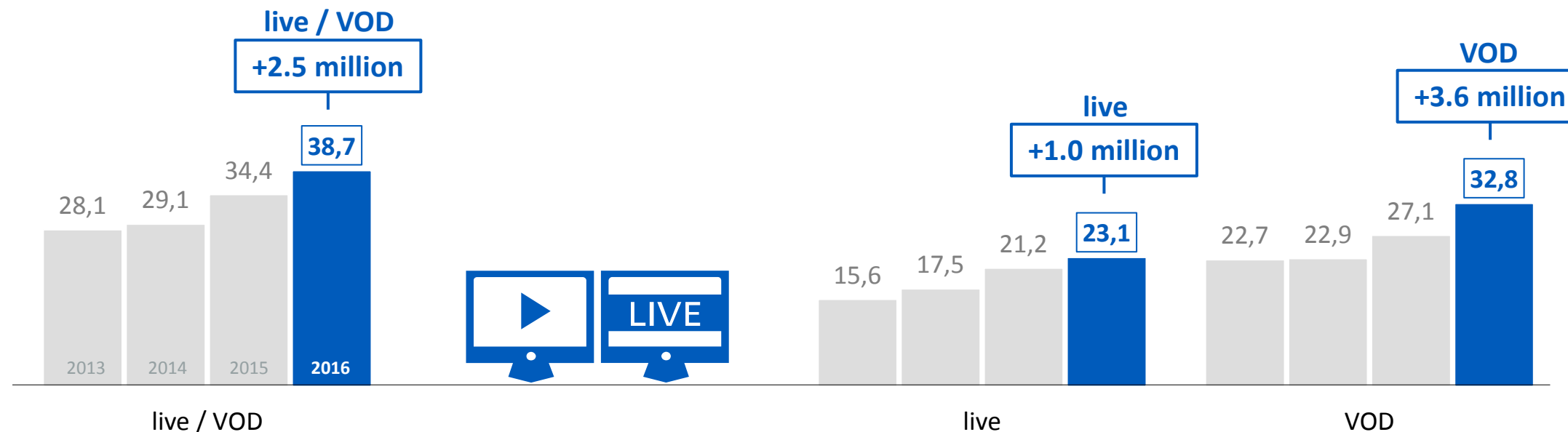


## 2

## Usage of audiovisual (online) platforms

## Regular online video consumption - linear vs. non-linear

VOD grows stronger than live streaming. Increase of 3.6 m monthly users over the last year



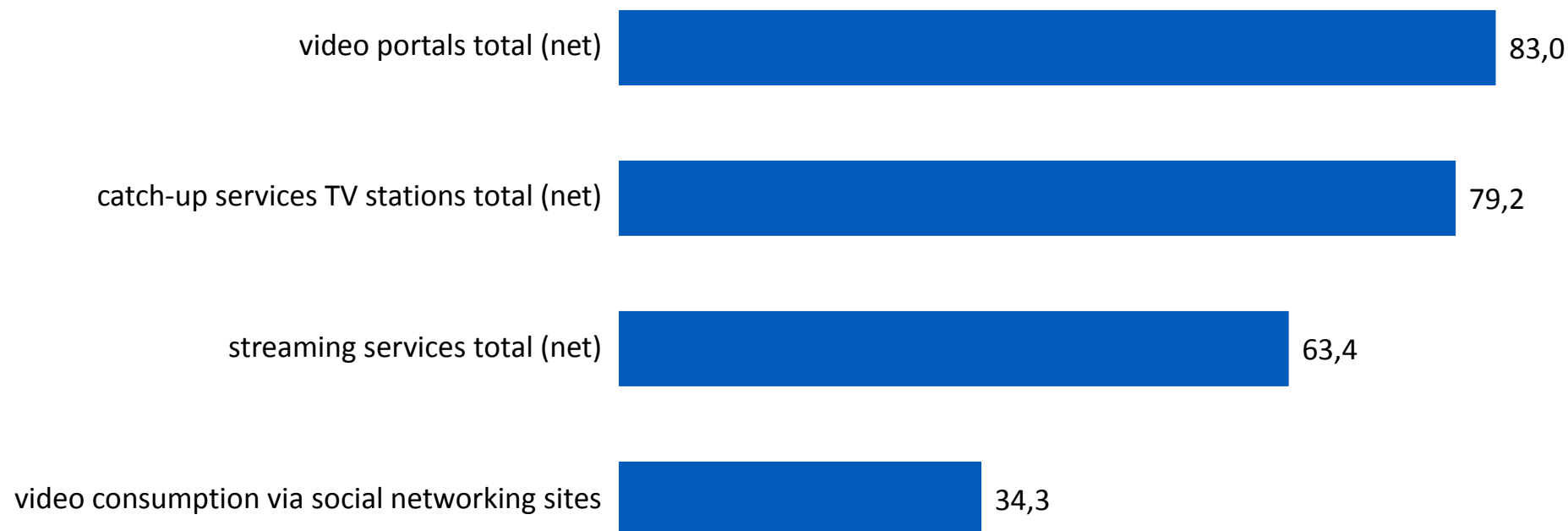
Source: Digitisation 2016 / TNS Infratest  
in per cent; uses VOD (professional content) / live streaming at least once a month  
Basis: 70.214 / 70.326 / 70.525 / 69.241 million persons aged 14 years or older in Germany

## Regular online video consumption – types of platforms

YouTube and catch-up services head to head. About one third consume online video via social networks

*Basis: regular VOD users (at least once a month)*

Ø 38 years, 53% male



Source: Digitisation 2016 / TNS Infratest  
in per cent, basis: 22.732 million persons aged 14 years or older in Germany, who consume VOD (professional content) at least once a month

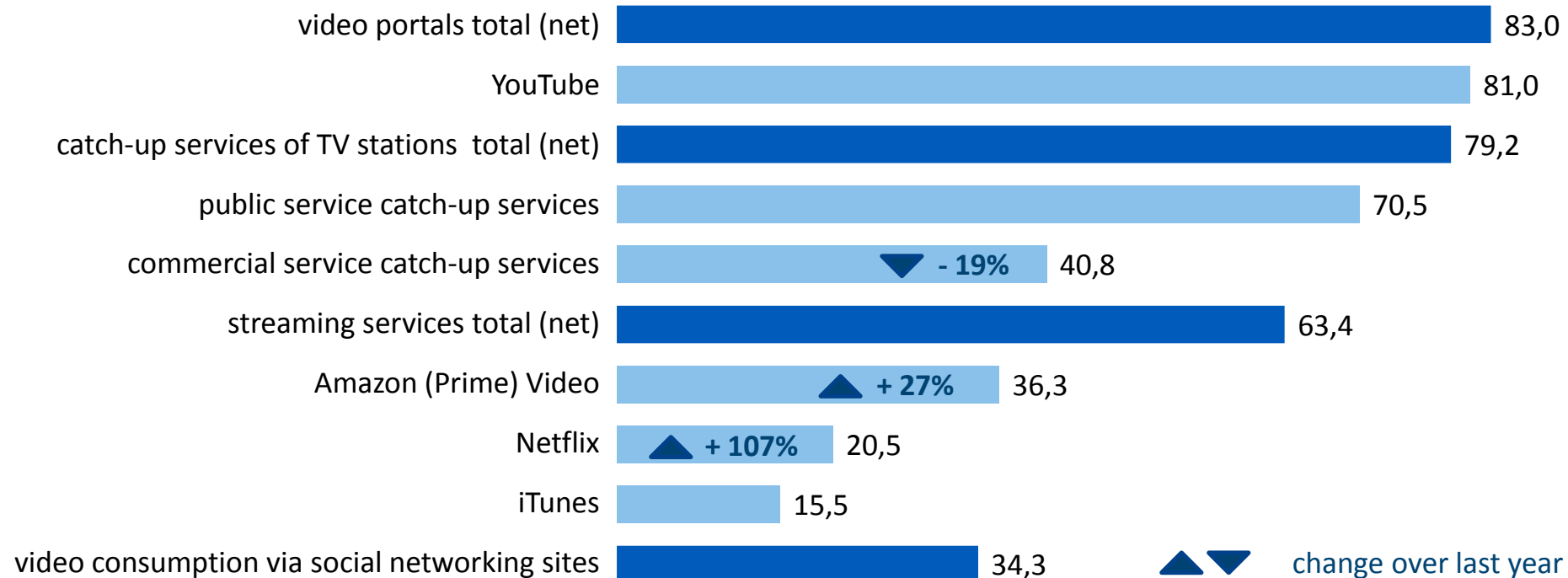


## Regular online video consumption – individual platforms

YouTube dominates online video market. Netflix doubled usage over the last year.  
Amazon video is growing.

*Basis: regular VOD users (at least once a month)*

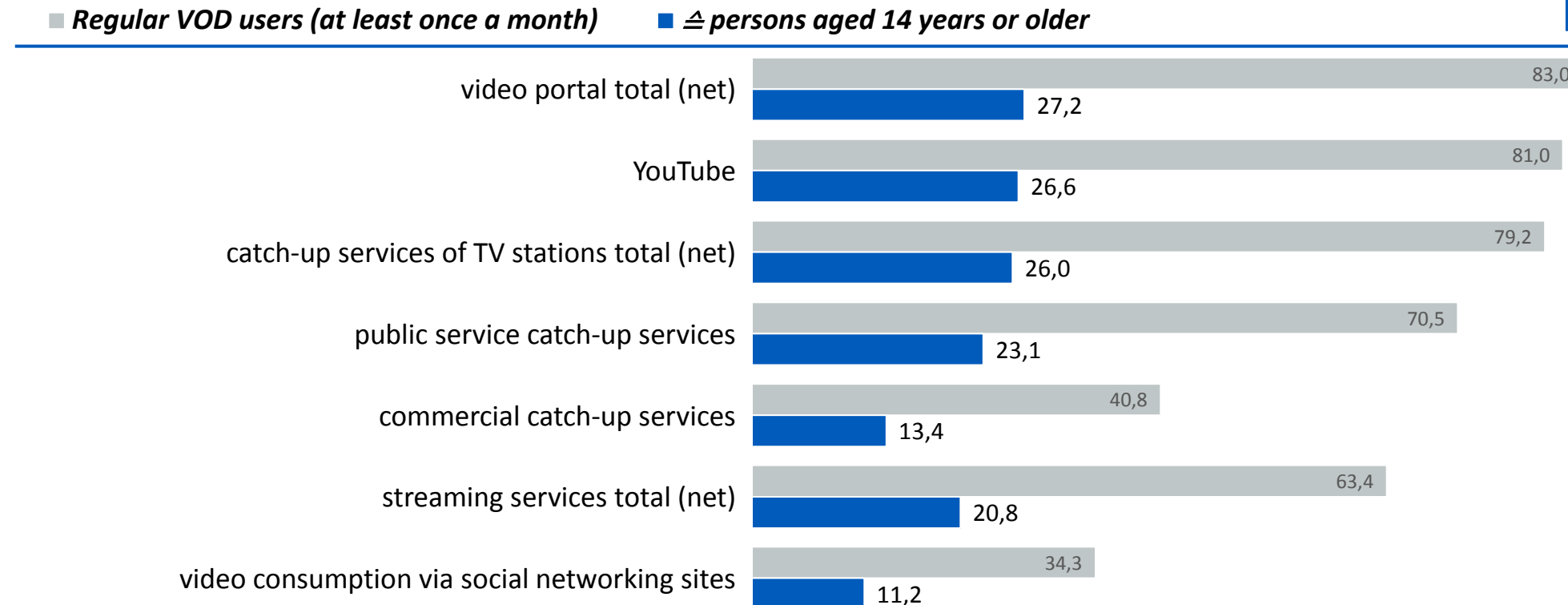
Ø 38 years, 53% male



Source: Digitisation 2016 / TNS Infratest  
in per cent; basis: 22.732 million persons aged 14 years or older in Germany, who consume VOD (professional content) at least once a month

## Online video consumption total: platforms

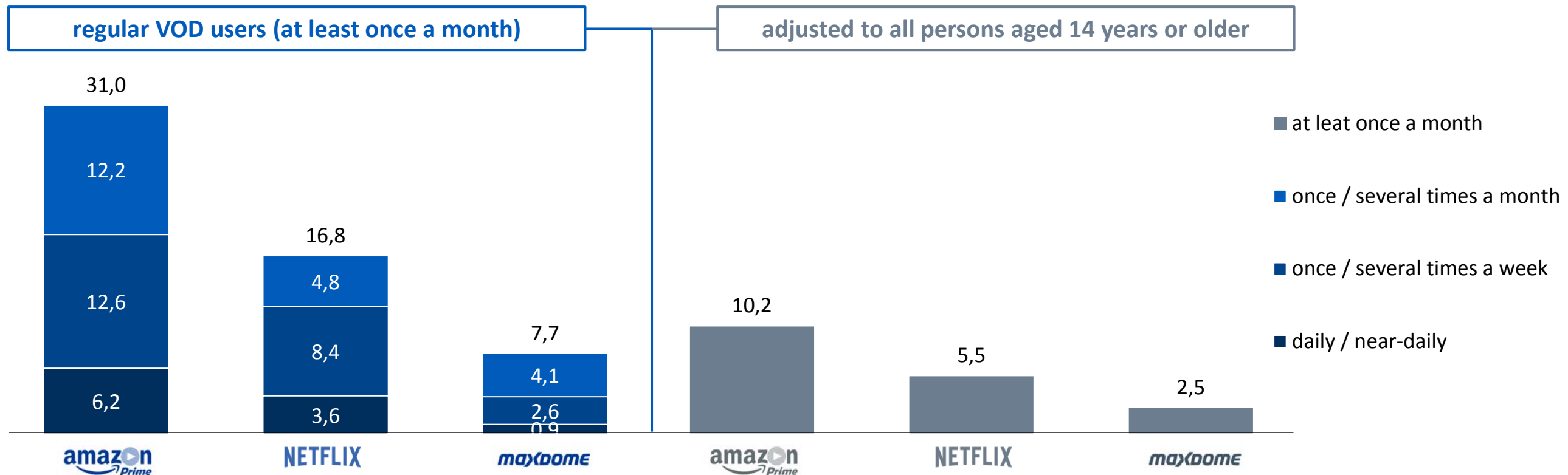
Based on all persons aged 14 years or older: one of four uses media libraries and YouTube as platform. One of five already uses streaming services



Source: Digitisation 2016 / TNS Infratest  
in per cent, 22.732 million persons aged 14 years or older in Germany, who consume VOD (professional content) at least once a month / 69.241 million persons aged 14 years or older in Germany

## Dominant SVOD streaming services (Subscription-Video-on-Demand)

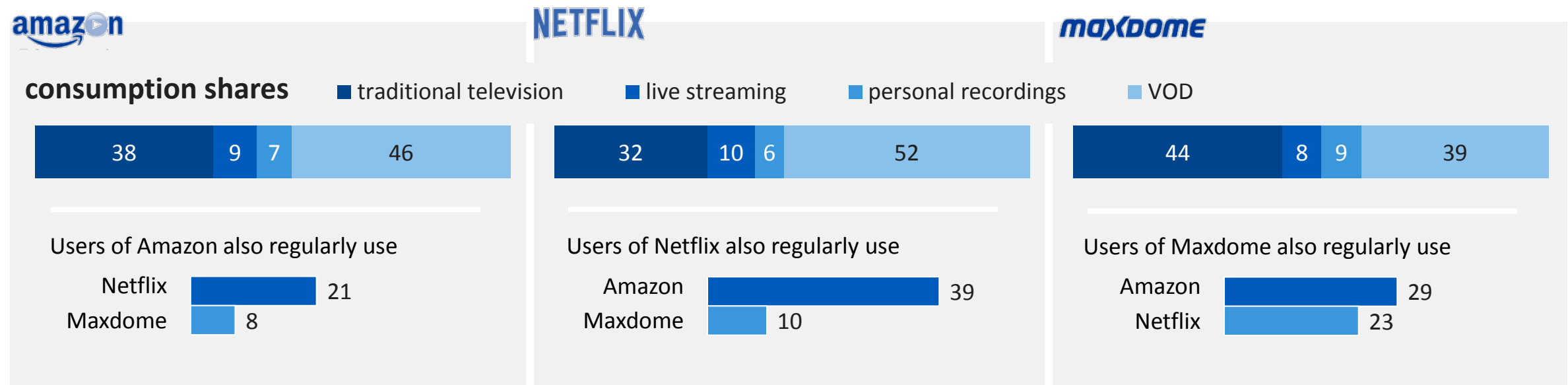
About one third of regular video consumer uses Amazon Video at least once a month.  
Half of that uses Netflix regularly. That equals 10 resp. 6 per cent of the population



Source: Digitisation 2016 / TNS Infratest  
in per cent, 22.732 million persons aged 14 years or older in Germany, who consume VOD (professional content) at least once a month / 69.241 million persons aged 14 years or older in Germany

## Comparison of users of online media libraries: Shares / Multi-Homing

Users of Amazon and Netflix watch more VoD than traditional TV. One single online video service does often not suffice: Multi-Homing widespread, despite multiple costs.



Source: Digitisation 2016 / TNS Infratest

in per cent; regular use = at least once a month; basis: 7.038 million / 3.821 million / 1.514 million persons aged 14 years or older, who use Amazon Video / Netflix / Maxdome at least once a month



# 3

## Roundup and conclusion

## Roundup & Conclusion

- Traditional TV still dominates audiovisual media consumption in Germany
- But: potential and usage of non-linear services and online video platforms are growing
- YouTube and catch-up services are in front
- But: Amazon, Netflix & Co. are catching up
- Regular online video consumers tend to favour already VOD instead of traditional TV
- But: many use different streaming services
- State Media Authorities in Germany
  - ⇒ are monitoring developments in the platform and online video market closely
  - ⇒ are demanding legal adjustments – where appropriate and necessary – in order to provide for an adequate regulation in the future



# Thank you!

(<http://tinyurl.com/digitisation2016>)





# Backup

Methodology

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## Methodology (brief summary)



### **Telephone interviews**

combination of fixed-line telephone and mobile phone numbers



### **Population basis:**

Population in German-language households aged 14 years  
or older; 69.241 million persons in 39.372 million households



### **Number of interviews:**

About 8200 interviews, at least 200 per federal state



### **Period of data collection:** 02 May till 21 June 2016