

## Press Release

### **Online TV in Germany gains ground through mobile use, hybrid TV, and social media**

*“Web TV Monitor 2011” by BLM and Goldmedia is published at the German conference Medientage München*

Munich/Berlin, October 19, 2011. According to the BLM “Web TV Monitor 2011”, there are currently 1,418 online-TV services in Germany, with 166 million daily video hits. Video access numbers have increased by about 10% compared to the previous year. Short, three- to five-minute clips on video-sharing platforms still dominate. But longer formats, increasingly offered online by professional content producers, have also enjoyed greater popularity.

The means for accessing online videos continue to diversify. Adding to the ranks of PCs and smartphones are diverse new devices such as tablets, game consoles, and internet-capable hybrid TVs, leading to increases in both user levels and the variety of services for online TV.

In order to make the market structure of the online TV world more transparent, Berlin strategy consultant Goldmedia was commissioned by BLM, the Bavarian Regulatory Authority for Commercial Broadcasting, to produce “Web TV Monitor 2011” (<http://www.goldmedia.com>; <http://www.blm.de>). The study’s examination of the growth and use of online TV in Germany is based on primary data research through survey of all German online TV providers and the annual study is being published for the second year. The key results will be presented on October 19, 2011 at the German conference Medientage München.

#### **Web TV services: most services are sub-brands of the traditional media**

The traditional media’s video and online portals are the category with the highest number of services, with a 43% market share. About one third (33%) are online TV channels that are produced exclusively for the Internet – so-called Internet-only channels. Other online TV services include corporate TV and video-shopping sites (9%), non-commercial online TV channels (5%), media stores and video centers (a combined 4%), and video-sharing platforms (3%).

Compared to 2010, the number of Internet-only channels has increased, with 36 new services. But online services from traditional media, which increasingly include video content, are also contributing to growth. There were 35 new online services from traditional media compared with 2010. In addition, corporate TV and non-commercial services drove growth in the market.

#### **Online TV usage: popularity of longer formats increases**

As the number of services increases, video access figures are also rising strongly. The services included in Goldmedia’s survey for “Web TV Monitor 2011” achieved a total of about 166 million video hits per day, or about five billion per month. The greatest share of use remains concentrated on video-sharing sites like YouTube (88%), whose content is becoming more and more popular. But online media and video centers with appealing content and longer formats (complete TV shows, series, and feature

films) have also seen increased demand. These providers have now reached over 240 million video hits per month, an increase of 30% relative to 2010.

### **Distribution channels for online TV: mobile more important**

Availability on all types of devices is becoming more important for the success of online-TV services. According to the “Web TV Monitor 2011” survey participants, only 3% of video hits were through mobile devices in 2010, but providers expected strong growth to 25% by 2013.

According to Goldmedia’s analysis, achieving this high share for mobile hits will require optimally adapting content for these devices. In this respect, online-TV providers are still in the trial phase and, for now, are optimizing their content only for select platforms. Preferences for various platforms aren’t equal: 90% of providers who have adapted their services for mobile devices offer service for Apple’s operating system, 43% offer service for Android’s OS, and 38% for Window’s OS.

Hybrid TV via the home TV is also gaining significance for the market. Although access figures via hybrid TV are still barely on the radar, surveyed providers expected its share of hits to rise to 6% by 2013.

Media centers, video centers, and TV channels’ online-video services in particular stand to profit from growth in hybrid TV. But Germany is still far behind developments in the USA, where Netflix gets about 60% of its hits from Playstation and Xbox’s internet-capable game and media consoles alone. One reason for slower development in Germany is the absence of a content aggregator on which all platforms are represented.

### **Social media carve out a niche as intermediary platforms: social TV**

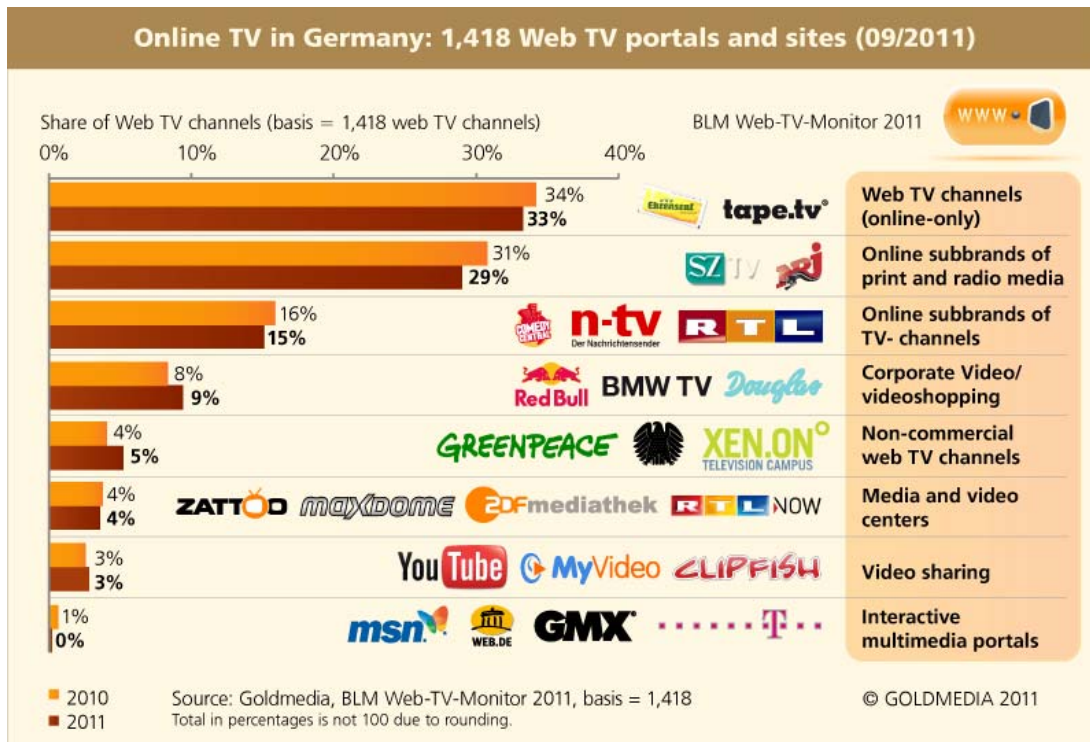
Social media are an important driver for online video services. The surveyed online-TV providers reported that 5% of hits were already being generated via social media sites like Facebook and Twitter in 2010. Providers expect an increase to 13% by 2013. The recommendations of friends and acquaintances play a growing role in helping users orient themselves in the universe of online video services. Facebook’s recent steps to establish itself as the recommendation platform for consumer media content could serve to create a new intermediary.

### **Research methods for “Web TV Monitor 2011”**

In surveying online-TV services for BLM’s “Web TV Monitor 2011”, Goldmedia laid out uniform criteria for online-TV services. Online-TV services were defined as those video services that were regularly updated, could be accessed via a standard web browser, were targeted at a German audience, and whose content was either primarily user generated or licensed and in adherence with all legal standards (copyright, protection of minors).

For the primary data research conducted by Goldmedia in September of 2011, all online-TV providers were contacted with a survey.

**Chart: Online TV in Germany**



**Source: "Web TV Monitor 2011", BLM – Goldmedia**

Goldmedia conducted the study "Web TV Monitor 2011" on behalf of the Bavarian Regulatory Authority for Commercial Broadcasting (BLM). "Web TV Monitor 2011" is the second comprehensive market study on the German online TV market with information on prevalence and use, ad forms and ad revenues, scope, and performance figures. The study is based on wide-reaching primary data research gained through survey of all online TV providers (n=1,418) in September 2011. The study contains analyses of the market and its potential as well as a categorization of online TV channels according to service type.

You can find further information at [www.webtvmonitor.de](http://www.webtvmonitor.de)

**The study can be accessed for free at:**

<http://www.webtvmonitor.de>

<http://www.blm.de>

<http://www.goldmedia.com>

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