

Pay-VOD in Germany - Forecast 2016-2021

German video-on-demand market insights - Sample

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Revenue per T-VOD/EST/S-VOD user per year (ARPU p.a.) 2010-2021

Number of S-VOD subscribers in Germany 2011-2021 in mio.

Ø revenue per T-VOD transaction 2010-2021, in EUR

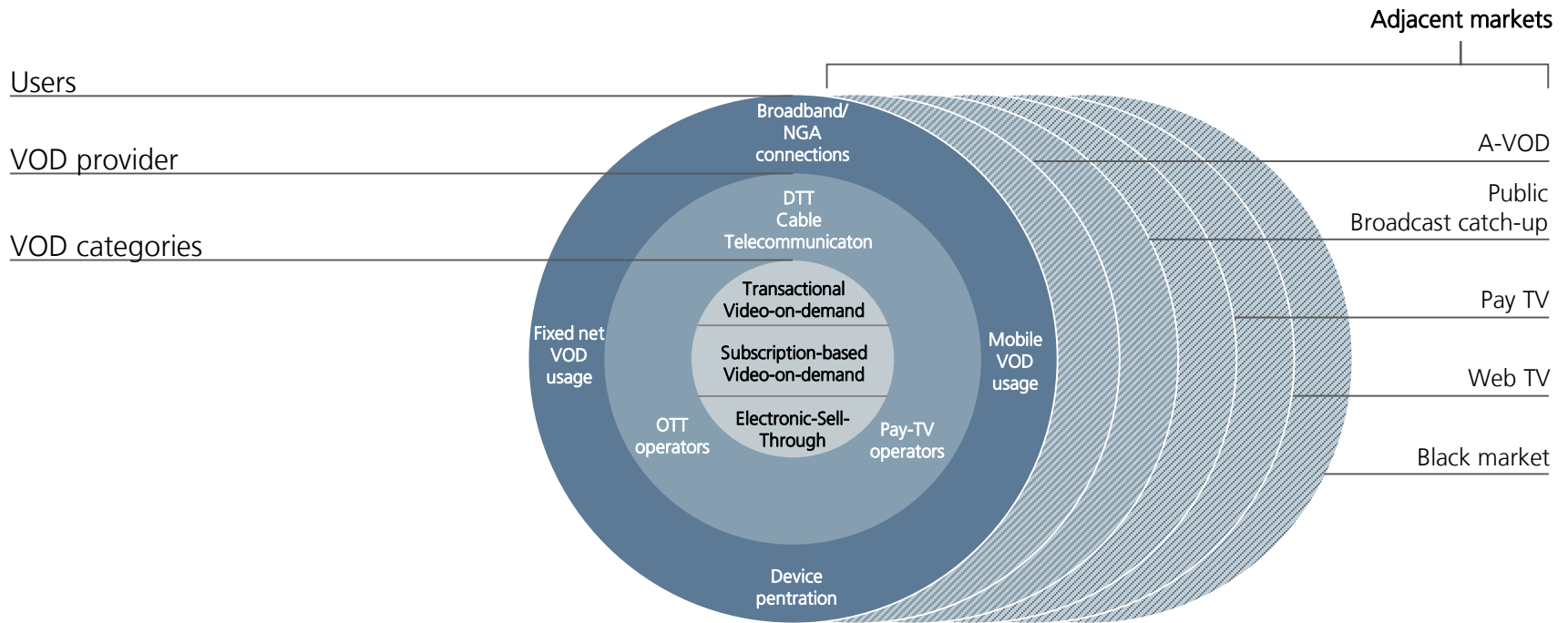
Ø number of T-VOD transactions per user per year 2010-2021

Ø revenue per EST buyer 2010-2021 in EUR (ARPU p.a.)

German Pay-Video-on-demand Forecast 2016-2021

Online video market classification & focus

Environment of the German video-on-demand market structure



Focus of the report & Methodology

- The report focuses on legal Pay-VOD services marketing content in Germany (T-VOD, EST, S-VOD)
- Ad supported VOD (A-VOD), public broadcast catch-up, Pay TV, Hotel VOD & B2B services are not included in the analysis
- All market estimates were discussed upfront with market experts for further substantiation in June 2016
- The forecasts on revenues for T-VoD, S-VoD and EST-Services for 2021 is mainly based on:
 - Primary & secondary market & database research, analyses of available industry data
 - Customer survey by Goldmedia Custom Research
 - Systematical top-down approaches for market estimation

Source: Goldmedia Analysis 2016 – Goldmedia Video-on-demand forecast 2016-2021

Pay-VOD Competition in Germany: 38 platforms – Majority still focusing on T-VOD and EST

Mapping of the Pay-VOD provider in Germany by revenue model, 2016



Source: Goldmedia Analysis 2016 by Provider information 06/2016

Providers are offering more VOD revenues models

Total Pay-VOD market: Netflix and Amazon boosts S-VOD growth; T-VOD & EST profit by shift to digital transactions

German video-on-demand market revenue forecast (gross), 2010-2021, in mio. EUR

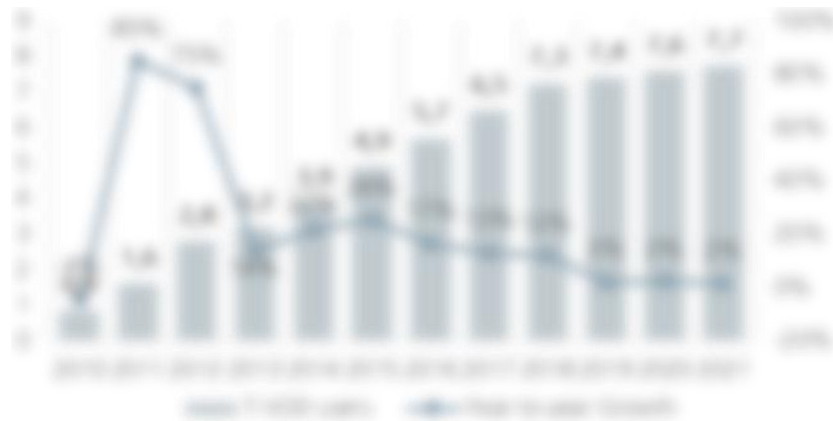


Source: Goldmedia Analysis 2016, Historic data: BVV/GfK Consumer Panel 2007-2015

T-VOD: Shift from physical to digital rentals results in rising numbers of T-VOD users, +X% from 2010 to 2021

Number of T-VOD users 2010-2021 in mio.

Ø revenue per T-VOD transaction 2010-2021, in EUR



Key assumptions

- T-VOD segment gains from the overall rising popularity of VOD, especially from the shift from physical to digital rentals
- Occasional rental store customers increasingly switch to T-VOD
- Frequent physical customers are more loyal to rental stores and only gradually migrate to online platforms
- Witness the rising popularity of series and TV shows lead to an increase in T-VOD since each T-VOD license only includes a fraction of shows available
- However, there is also a counter trend due to users who stick to T-VOD offerings and do not rent or buy digital video content
- No. of T-VOD users will increase with a CAGR of 8% from 2015 to 2021

Key assumptions

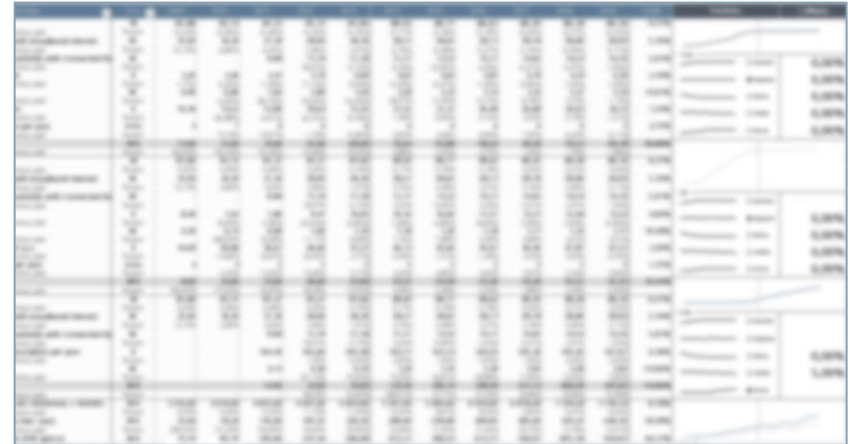
- T-VOD has a nearly balanced viewing ratio of licensed newly released/older content and long tail (cheaper content)
- In 2015 40 percent of the T-VOD revenue will be generated by new releases, 60 percent are derived from older content
- With T-VOD offerings becoming, T-VOD prices for older inventory are expected to fall
- But shorter periods between theatrical and rental release of blockbusters as well as popular series not included in T-VOD packages will support T-VOD usage
- Thus revenue streams of recent movies and series could increase which will offset effects of lower prices for long tail inventory

Excel module containing all necessary analytics to develop and model your approach to the VOD market

Example #1: Front-end interaction



Example #2: Database module



Key features

- Active modeling options for sensitive market variables, custom-analytic functions and forecast mapping until 2021
- Additional custom scenario creation with a step-by-step guide – tailored to the demands of your enterprise
- Dynamic graphs, plots, dashboards and data timelines
- Compile, create and export detailed market reports in XML, CSV, PASW/SPSS, PDF and Pivot formats

Your benefits

- User-friendly navigation through rich market data and market modulation
- Put together merger and acquisition as well as strategic market forecasts for a rapidly growing market
- Evaluate and allocate budgets according to market fluctuations and forecast projections
- Identify existing market demand to quantify market potential for new VOD segments and products
- Be prepared for new market entries, technological disruptions and swift changes in a highly volatile market

Source: Goldmedia 2016

Pricing and ordering information:

You can choose between different versions

Goldmedia report: Pay-Video-on-demand Forecast 2016-2021, release: 07/2016



Please contact us for any questions and orderings:

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The report is only available in English.

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REPORT + WORKSHOP
Price on application

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Source: Goldmedia 2016