

TV Streaming Report 2022

Germany

Dear Sir or Madam,

How has the TV viewing behavior of German Internet users developed in the second year of the COVID-19 pandemic? What changes have there been in the use of TV services on the Internet? Streaming TV provider Zattoo sheds light on these and other questions in this year's 2022 Streaming TV Report. The results for Germany show that the Internet is the most-used TV viewing channel for the first time and that the use of live TV will continue to increase in 2022.

The report is based on an online representative survey conducted by the market research company Kantar on behalf of Zattoo which involved 1,000 German internet users between the ages of 16 and 69 in an online panel at the beginning of 2022. Kantar and Zattoo have been conducting this survey in Germany every year since 2015. The report helps to identify current developments in Internet and TV usage, as well as in the area of TV streaming. The report is Zattoo's contribution to the discussion about the importance of TV streaming. The following trends can be identified for Germany this year:

For the first time, the Internet is the most widely used TV reception method

In terms of TV reception methods, the trend of the last few years is continuing. Forty percent of Internet users in Germany now use the Internet exclusively or in addition to another TV reception channel to watch television. This includes both IPTV services and TV streaming apps. This is four percentage points more than in the previous year. This means that for the first time, the Internet is the most widely used TV viewing method in Germany. Previously, the most widely used method was cable, which at 38 percent was down three percentage points from the previous year. Reception via satellite is also down one percentage point to 39 percent. The use of DVB-T gained one percentage point this year, and is now 9 percent.

Live TV use on the internet continues to rise in 2022

Among video and TV services, 31 percent of users online watched live TV via the Internet during the second year of the COVID-19 pandemic. This is six percentage points more than in the previous year and eleven percentage points more than in 2020. This means that live TV has never been watched more frequently via the Internet than in 2022.

The broadcasters' media libraries are used by 49 percent of the online users in Germany and thus lose one percentage point compared to the previous year. Among media library users, the most-used platforms are ARD (79 percent) and ZDF (77 percent), which have seen further growth compared to the previous year.

The use of YouTube is stagnating and remains at the previous year's level of 64 percent. However, the video portal is still the most-used TV and video service among German internet users.

Video-on-demand only increased slightly this year, from 32 percent in 2021 to 34 percent. The clear winner among the providers is Disney+, which grew by another eight percentage points and is now used by 39 percent of video-on-demand users.

For the first time this year, the survey also asked about the use of video content offered via social media. These came in at 19 percent in the first year of the survey.

Two out of three TV streaming users are watching on smart TVs

79 percent of internet users who watch TV at least once a week are already using TV streaming services. When asked which devices they use most for TV streaming, smart TVs came out on top this year, landing in first place. Smart TVs have already been the most-used devices for TV streaming services since 2020 and this trend continues in 2022. Two out of three TV streaming users (64 percent) are already watching on smart TVs. This is eight percentage points more than in the previous year. Streaming devices that connect the TV to the Internet also grew by three percentage points, reaching 22 percent this year. Laptops and PCs remain in second place after smart TVs at 43 percent and smartphones at 28 percent, even though both device categories lost four percentage points compared to 2021.

More than half can imagine using TV exclusively via the Internet

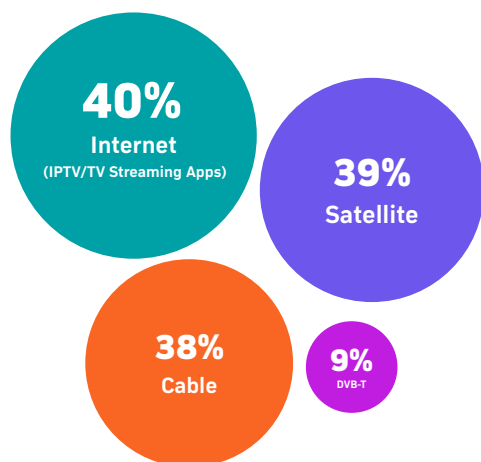
More and more people are using the Internet as a TV reception method. And the use of live TV via the Internet also continues to rise. This development is also reflected in the question of whether German Internet users can imagine using TV services exclusively via the Internet in the future. More than half (52 percent) say they can (absolutely) imagine doing so. This is five percentage points more than in the previous year, which underlines the trend in recent years towards more TV streaming usage. At the same time, the number of those who can't imagine doing so has continued to fall compared to 2021 and is now only 17 percent, compared to 23 percent in the previous year. The number of people who use TV services exclusively via the Internet has not changed. This figure remains at four percent.

Best regards,



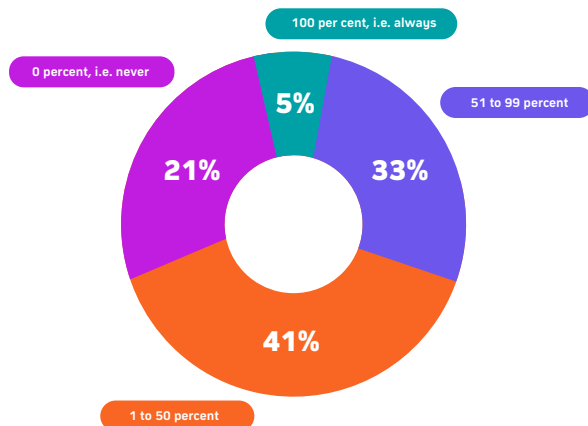
Jörg Meyer
Chief Commercial Officer at Zattoo

1 How do you receive TV in your household?



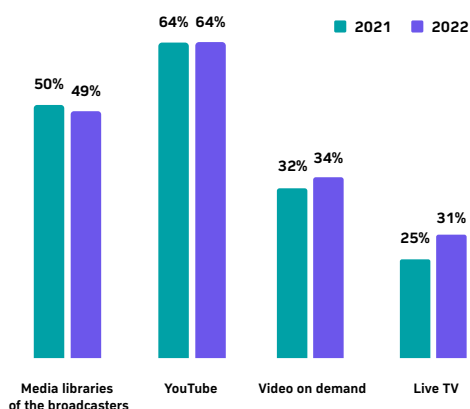
Basis unweighted: 1000
Multiple answers possible

2 How much of your TV viewing time do you use TV streaming services?



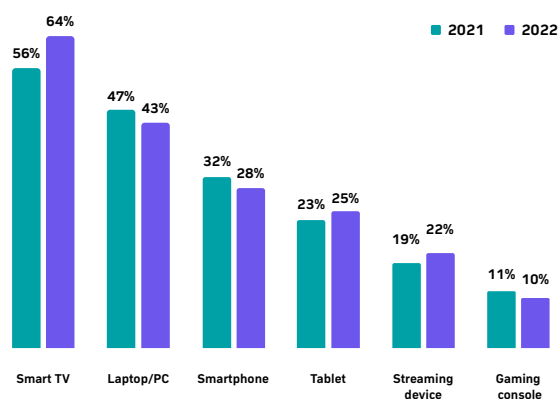
Basis: TV viewers at least 1 day per week
Basis unweighted: 883

3 Which television or video offerings do you use on the internet?



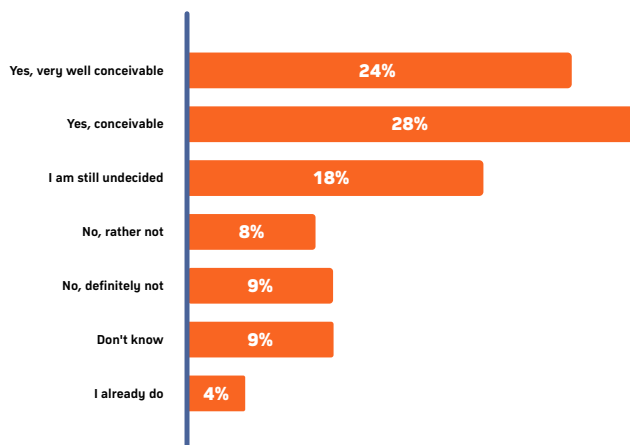
2022 Basis: Total*
2021 Basis: Users of at least 1% TV streaming services
2022 Basis unweighted: 1000
2021 Basis unweighted: 675
Multiple answers possible
*Other basis due to changed query

4 On which devices do you watch TV via the internet?



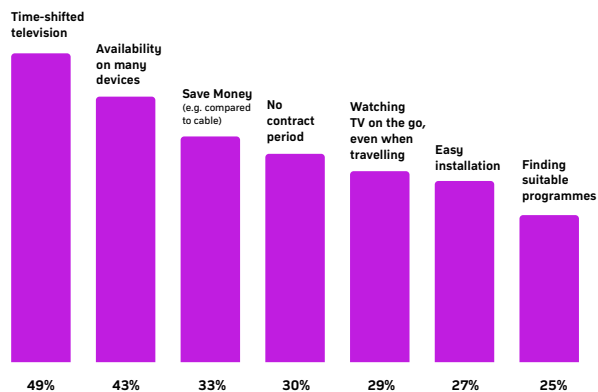
Basis: Users of at least 1% TV streaming services
2022 Basis unweighted: 697
2021 Basis unweighted: 675
Multiple answers possible

5 Can you imagine using your TV service exclusively via the Internet in the future?



Basis unweighted: 1000

6 What are the most important advantages of TV streaming?



Basis: Users of at least 1% TV streaming services
Basis unweighted: 697
Multiple answers possible