

# TV Streaming Report 2024

## Germany

Dear Sir or Madam,

In 2024, the ongoing economic uncertainty and changes in the media landscape will be reflected in Germans' TV viewing habits. More and more are shifting to the Internet to watch TV, while the use of traditional cable TV continues to decline. This trend will continue due to discontinuation of the so-called Nebenkostenprivileg (ancillary cost privilege) on 1 July 2024. Zattoo's TV Streaming Report this year reveals these and other findings.

The report is based on an online survey conducted by YouGov, in which 1081 people in Germany took part between 15 January 2024 and 22 January 2024. The results were weighted and are representative of the German population aged 16 and over. Zattoo has been conducting this survey in Germany every year since 2015. The TV Streaming Report helps identify current developments in Internet and television usage as well as TV streaming. In this way, Zattoo aims to contribute to the discussion on the importance of TV streaming. The following trends can be discerned for Germany this year:

### Internet TV continues to grow, whereas cable TV is losing significant ground

The trend towards television via the Internet will continue in 2024. When asked which way they use to watch TV (multiple answers possible), 44 percent of respondents choose the Internet as their way of watching TV. That is another 3 percent more than in 2023, while watching TV via traditional cable continues to decline. Only around one in three (31%) watch cable TV. That is a whole 8 percent less than in the previous year. Watching TV via satellite (32%) and DVB-T (7%) also fell by 3 percent each this year.

### The use of live TV: back to the 2022 level

This year, 31 percent of respondents said they watch live TV content. This is a decline of 5 percent for traditional TV compared to the previous year. In contrast, the use of media libraries, YouTube and video-on-demand services remains stable. The fact that one in three (36%) can already imagine watching linear-themed channels, so-called FAST channels, in the future suggests a growing interest in alternative, ad-supported TV content.

### Increase in the use of Internet TV on smart TVs

More than two thirds (70%) use TV streaming services during their TV viewing time – and are most likely to do so on a smart TV. Smart TVs have been the preferred choice for streaming TV programmes since 2020 – an increase of 2 percent compared to the previous year. Meanwhile, the use of laptops or PCs for this continues to fall sharply, from 38 percent to 32 percent this year. The use of mobile devices such as tablets and smartphones is also continuing to fall. This underlines the trend that Internet TV has now arrived in the living rooms of Germans and represents a comprehensive alternative to traditional ways of watching TV. However, it also suggests that other forms of consuming media are being favoured over TV streaming via mobile devices.

### The economic situation continues to influence streaming subscriptions

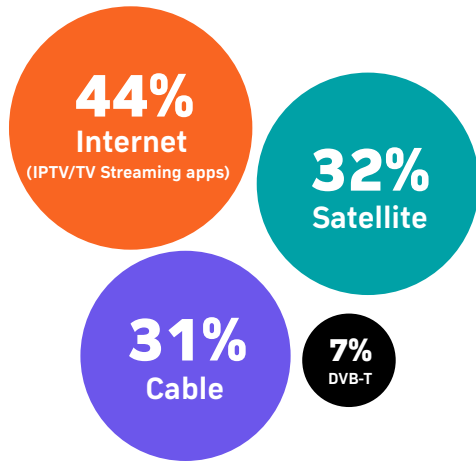
The persistently tense economic situation is also having an increasing impact on the streaming behaviour of those surveyed. Last year, almost one in five (18%) cancelled a streaming subscription – a significant increase of 4 percent compared to the previous year. Of these, around a third (36%) switched to cheaper streaming services, while around a quarter (24%) chose free options. It is worth noting that a significant proportion (36 percent) opted out of alternative services altogether. This development highlights consumers' growing need for a good price-performance ratio, including with regard to domestic TV and streaming services.

Best regards,

A handwritten signature in black ink, appearing to read "Jörg Meyer".

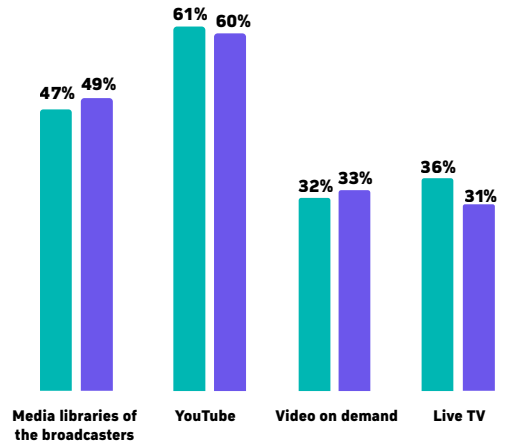
**Jörg Meyer**  
Chief Commercial Officer

# 1 How do you receive TV in your household?



Basis: Total  
Basis unweighted: 1081  
Multiple answers possible

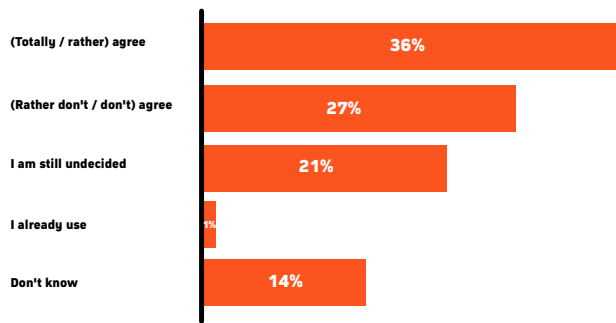
# 2 Which television or video offerings do you use on the internet?



Basis: Total  
2024 Basis unweighted: 1081  
2023 Basis unweighted: 1000  
Multiple answers possible

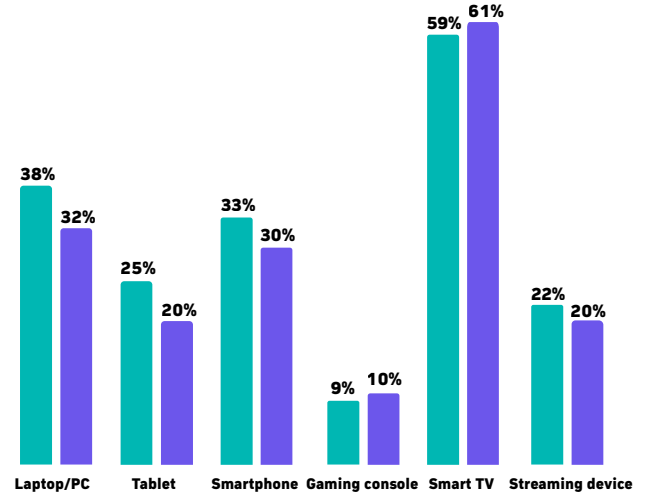
2023 2024

# 3 Can you imagine watching so-called FAST channels in the future?



Basis: Total  
Basis unweighted: 1081

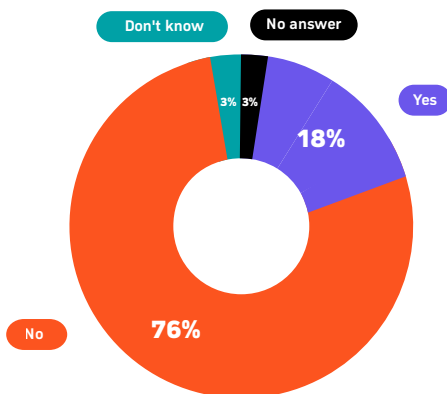
# 4 On which devices do you watch TV via the internet?



Basis: Respondents who watch TV via the internet  
2024 Basis unweighted: 788  
2023 Basis unweighted: 715  
Multiple answers possible

2023 2024

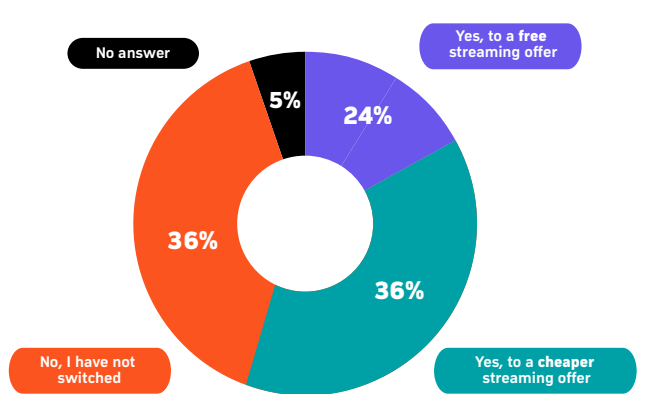
# 5 Have you already cancelled a streaming subscription due to the current economic situation?



Basis: Total  
Basis unweighted: 1081

Source: YouGov

# 6 Have you switched to cheaper or free offers due to the current economic situation?



Basis: Respondents who have cancelled a streaming subscription  
Basis unweighted: 196