

The Future of TV

Are European Hulu's an answer?



veed analytics

October 2019

About veed analytics

Market intelligence
and strategic advisory

for the global
video industry

with a focus on the
customer perspective



Founded in 2014

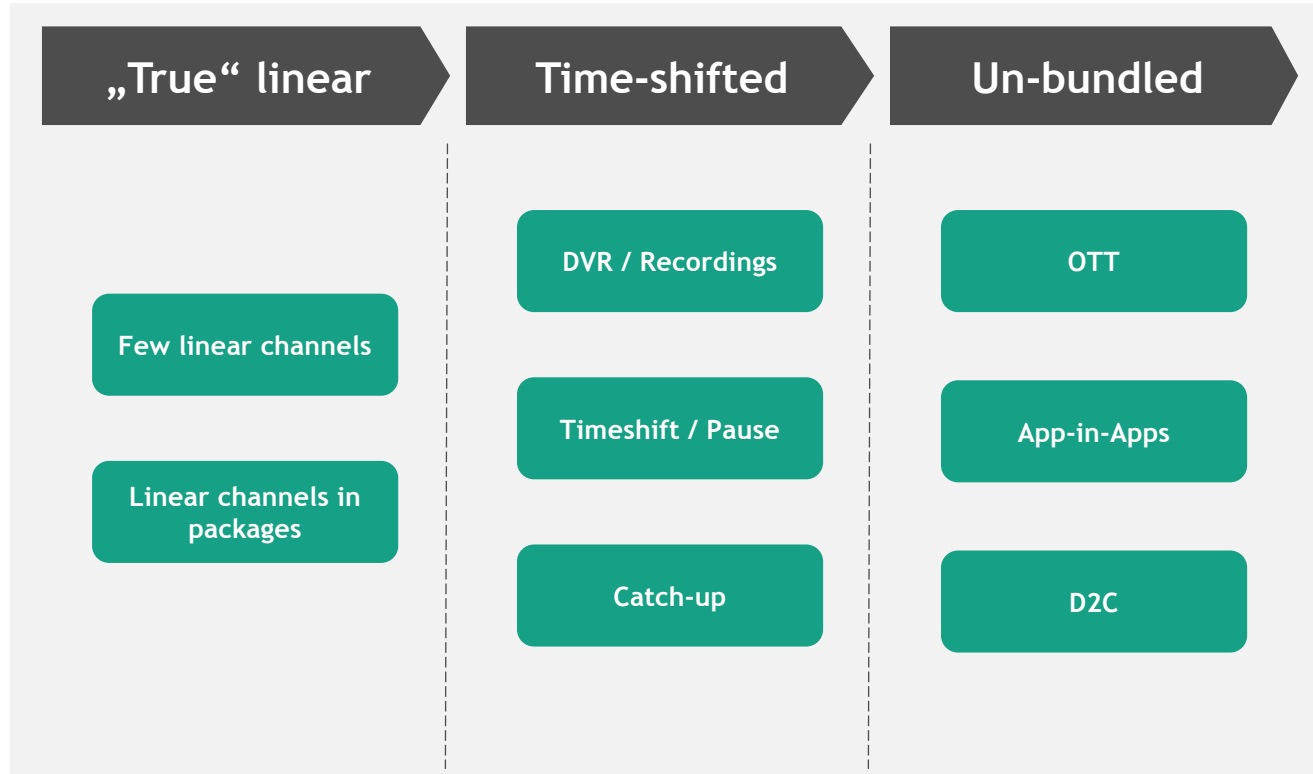
Based in Munich

Team of product &
content enthusiasts

A lot of happy
international clients

Linear TV - Relevant in the future

Linear TV - is quite a lot!



Greatest legal access

but



Quite complex ...

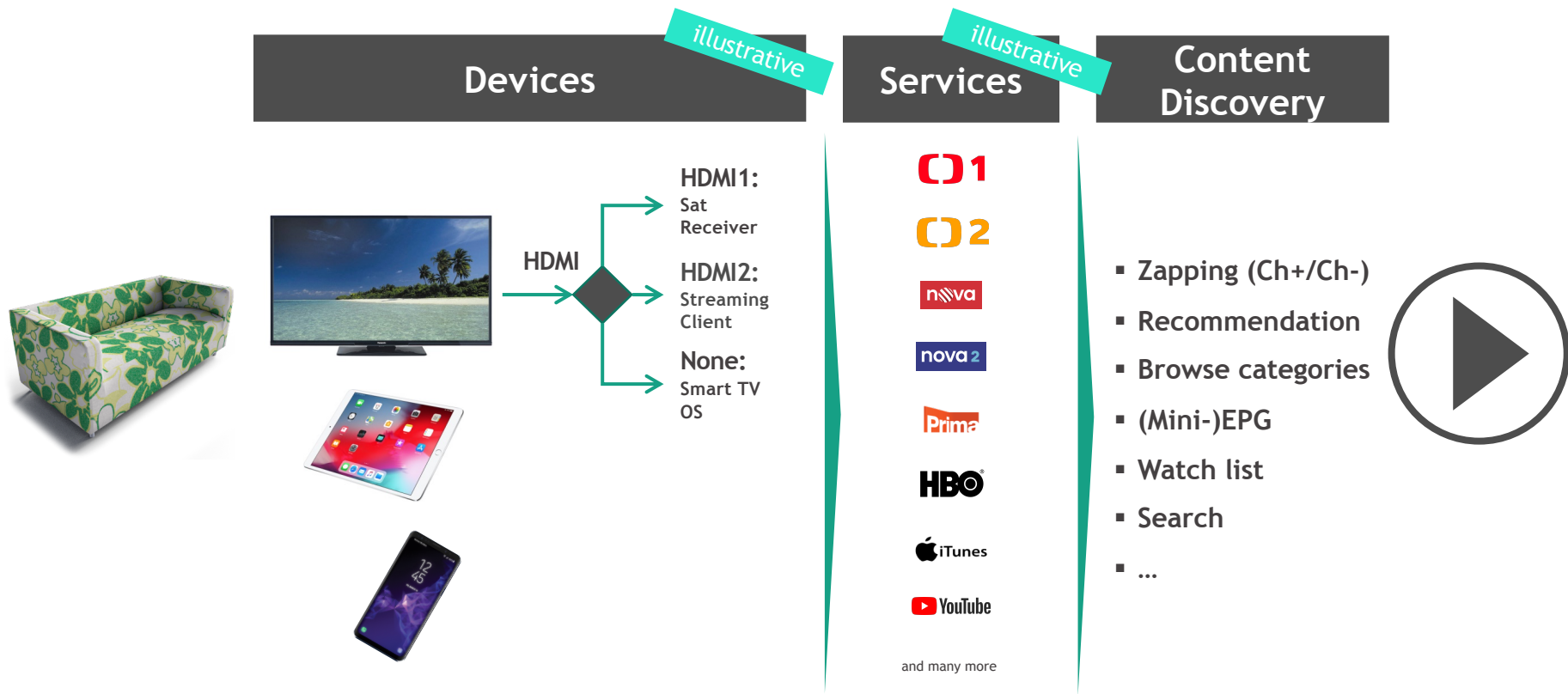
A lot of choices

- **Distribution:** Sat, Cable, IPTV, DVB-T2, OTT
- **P&P:** Packages, SVoD, TVoD, AVoD, others
- **Devices:** Big Screen, Small Screen

Traditional	OTT (Linear & on Demand)		
<p>Cable</p> <p>Sat</p> <p>IPTV</p> <p>DVB-T2</p>	<p>Live TV & Catch-up</p> <p>aggregated</p> <p>Broadcaster</p> <p>and further more</p>	<p>SVoD & TVoD</p> <p>SVoD</p> <p>SVoD & TVoD</p> <p>TVoD</p>	<p>AVoD</p>

	Big Screen										Small Screen				
	Apple TV	fire TV	chromecast	sky TICKET Roku	SAMSUNG	androidtv	XBOX	PLAYSTATION	NETFLIX	vodafone	T-Mobile	sky Q	PC/MAC	Apple TV	Android
NETFLIX															
prime video															
maxdome															
sky TICKET															
ARD*Mediathek															
DFMediathek															
TVNOW															
joyn															
subsequent															
ARD															
Zattoo															
waipu.tv															
Magenta															
ARD TV															
GigaTV															

... and every day tough decisions



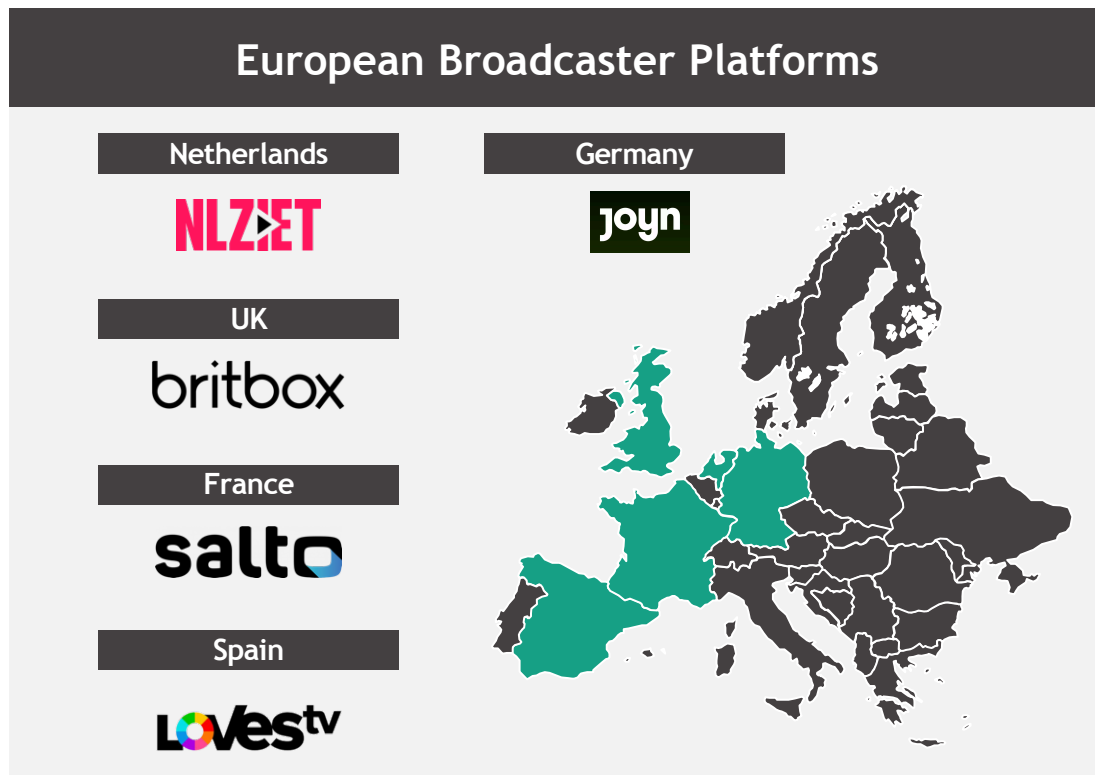
Linear TV - Relevant in the future

How to stay relevant?






1. Partnerships
2. Content surfacing
3. Leverage laziness

1. Partnerships: The Hulu model

hulu



1. Partnerships - European Platforms

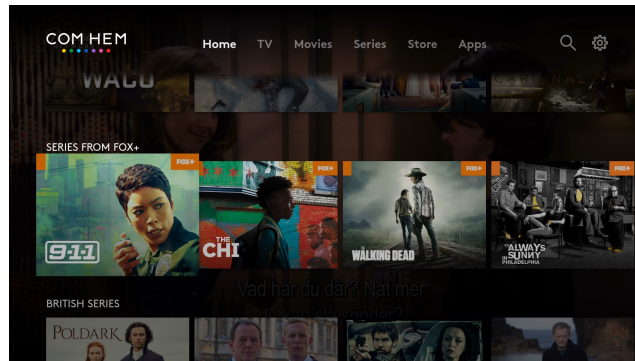
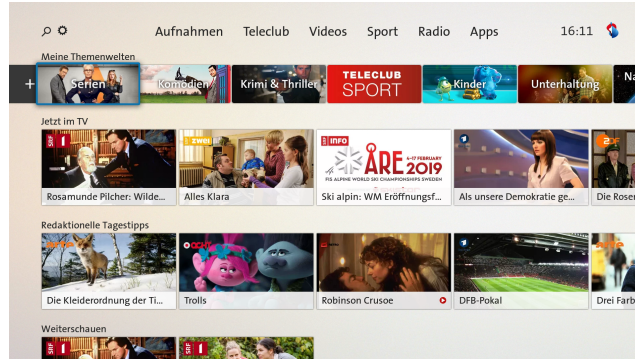
Service	Corporate structure	Business Model	Launch	Originals
	JV NPO, RTL, Talpa	SVoD	2014	no
	JV P751/Discovery	AVoD <i>SVoD (planned)</i>	Relaunch 2019	yes
	JV RTVE, Atresmedia, Mediaset	Aggregation	2018	no
	JV BBC/ITV	<i>(probably SVoD)</i>	2020	yes
	JV France Television/TF1/M6	<i>(probably SVoD)</i>	2020	yes

How to stay relevant?

1. Partnerships
- 2. Content surfacing**
3. Leverage laziness

2. Content surfacing

All about
visuals



Metadata are key

How to stay relevant

1. Partnerships
2. Content surfacing
- 3. Leverage laziness**

3. Laziness - Channel zapping

Old school

Zapping through:

- Channel Line-up with
- linear programming



New school

Zapping through:

- Channels with
- temporary available content



Some things do not change: Zapping - key in content discovery

Wrap-up

Linear TV - Relevant in the future: yes

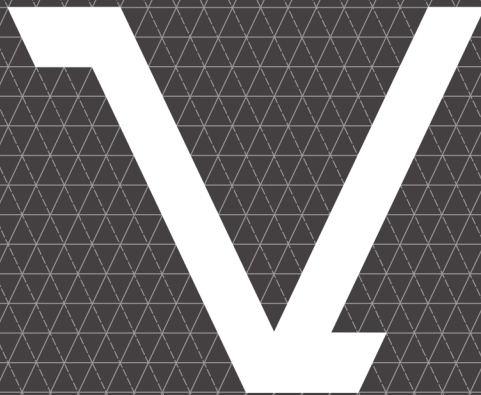
Constant

- Appetite for content
- Laziness of consumers
- Aggregation / Channels
- Bundles

Change

- Technology
- User experience
- Aggregator
- Fragmentation

THX



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