Content overload will increase the importance of electronic programme guides

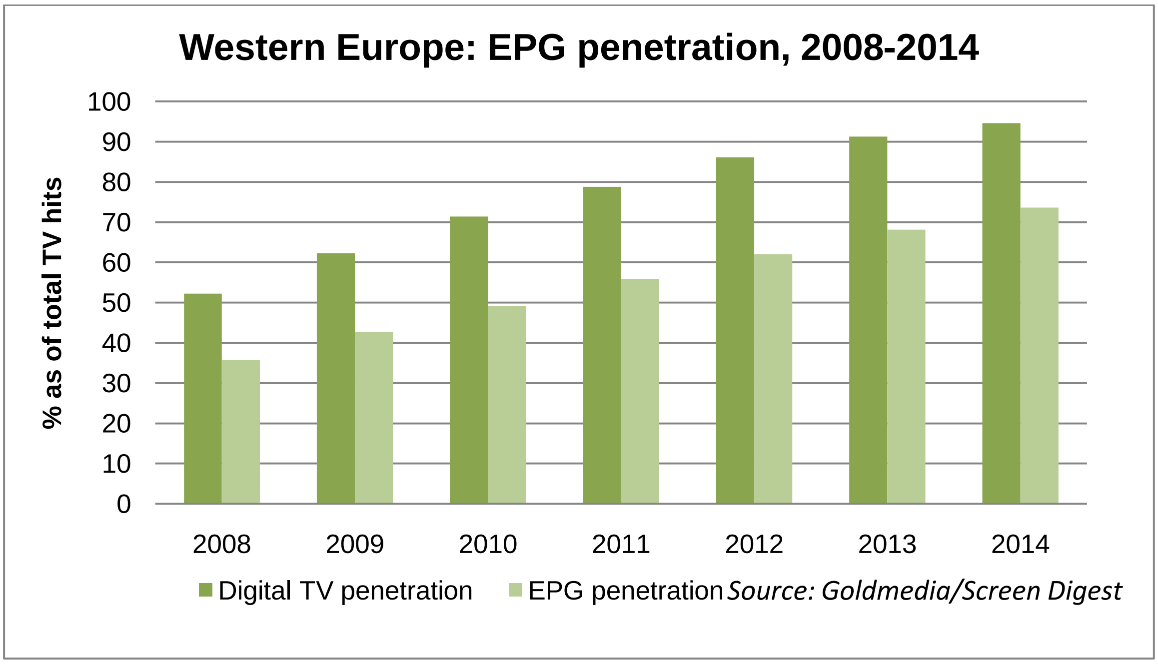
Almost three quarters of all TV households in Western Europe will have access to EPGs by 2014

London, Berlin 23rd February 2010: Thousands of TV programmes, catch-up TV video-on-demand archives, internet-TV services, video-sharing platforms and personal content currently compete for audiences. With such a huge range of content, the electronic programme guide (EPG) is being promoted to the increasingly important role of an entertainment guide for content-overloaded digital living rooms. That's according to the report 'EPGs and TV Middleware Applications: Market Assessment and Forecasts to 2014'. The report, a collaboration between media analysts Screen Digest (www.screendigest.com) and consulting firm Goldmedia (www.goldmedia.com), is supported by Presse-Programm-Service GmbH (pps), one of the leading European providers of programme information.

59 million households in Western Europe were equipped with EPGs at the end of 2008, a penetration of 36 percent of all TV households. This number will grow 19 percent yearly between 2008 and 2014 so that nearly three quarters of all TV households will have access to EPGs in 2014. The report has identified about 300 EPGs on the different platforms in Western Europe. These include EPGs in set-top boxes from pay-TV and infrastructure providers, online EPGs from TV guide magazines, TV platform providers, online providers and mobile EPGs.

Market volumes from direct revenues in Western Europe will triple by 2014

In 2008 the EPG market volumes from direct revenues in Western Europe amounted to about €156m. According to Goldmedia and Screen Digest forecasts, these revenues will nearly triple by 2014 to €451m. Direct EPG revenues primarily come from B2B transactions: from technical development, implementation of EPGs in end devices, licenses, software and programme updates. In addition the EPG is rapidly gaining significance as a transaction, advertisement and communication platform. As the gateway to viewers, the EPG is becoming both an interactive advertising medium and a sales portal for pay-TV and other content providers.



The UK is currently the most developed EPG market

The progress of development differs by country and corresponds closely to the digitization process of the TV infrastructure. The spread of pay-TV and IPTV, the degree of innovation among cable network operators and the proliferation of end devices with specific EPGs are essential factors in development.

The UK has been the most developed and innovative EPG market in Western Europe to date. 70 percent of UK TV households already have EPGs. The Sky Guide from British pay-TV market leader BSkyB is the most widespread EPG in Western Europe, with over nine million users. Cable network operator Virgin Media also offers customers access to the BBC iPlayer via its EPG in a hybrid set-top box.

The Scandinavian market has a large number of high grade and innovative EPGs. In France, Europe's leader for IPTV distribution, EPGs are well represented on the platform. EPG penetration in Italy is relatively high at 38 percent where the market benefits primarily from government subsidies for DTT boxes and the promotion of the interactive standard MHP. Germany lags behind many other countries in Europe, primarily because of the relatively low penetration of digital and pay-TV.

Global players are striving for a central role in home entertainment

A large number of players operate in the EPG market, covering various areas of the value chain: content providers; TV platform operators; middleware, application and end-device vendors. A variety of companies are responsible for the development, implementation, and maintenance of EPGs, including technical service and programme data providers.

“The traditional market for EPGs is in broadcast TV and it is likely to remain that way, but we are finding increased interest from non-traditional vendors including some of the largest consumer electronics and media companies. The lines are starting to blur and where content is sourced outside of pay-TV operators new entrants such as Apple, Sony, and Microsoft have an opportunity to provide branding and control into the living rooms. As hybrid services, home networking and multiple content sources become more mainstream, the EPG will be central in gaining control of our entertainment choices.” said Tom Morrod, Senior Analyst, Screen Digest.

EPGs evolution: from a digital programme magazine to an entertainment guide

“The EPG is becoming much more than a digital programme guide: it is evolving into an interactive, personalized and integrated entertainment guide.” concludes Mathias Birkel, senior consultant at Goldmedia and author of the report. “Whether on the television, the internet or mobile, the EPG of the future locates content that is of interest for the specific user. Not only will it offer automatic recommendations - either personal TV channels or personalized programme tips – but it will also include suggestions from friends, and from customers with similar interests from sites like Facebook.”

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About this research The research in this release is taken from the Goldmedia and Screen Digest report 'EPGs and TV Middleware Applications: Market Assessment and Forecasts to 2014'. Published in February 2010 and produced in collaboration by the two companies, the report comprehensively analyses the market and competitive situation for EPGs in Western Europe. A special focus is the changing role of the EPG: from the electronic equivalent of a programme guide magazine to an interactive, personalized and integrated entertainment guide. The most influential factors for current and future development are analyzed and assessed, including EPG revenue and user potential to 2014.

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About Goldmedia Since 1998 Goldmedia has provided national and international clients with high quality consulting and research services in the fields of media, entertainment and telecommunications. Goldmedia offers: in-depth analysis of markets and competitors; forecasts and strategic consulting services; the implementation of new business models; and consulting for restructuring whole companies, including M&A processes in the field of corporate finance. Goldmedia-Group: Goldmedia GmbH Media Consulting & Research, Goldmedia Sales & Services GmbH and Goldmedia Custom Research GmbH, Goldmedia Political & Staff Advising GmbH. The company's head office is in Berlin, Germany. Goldmedia is a member of the international network European Media Consulting Association (EMCA). www.emca.tv www.goldmedia.com

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